2006

STISets KY

Start of Year Procedures

This guide was created jointly by STI and the Kentucky Department of Education.

Information in this document is subject to change without notice. Student and school data used herein are fictitious unless otherwise noted.

Software Technology, Inc.
4721 Morrison Drive, Suite 200
Mobile, AL 36609-3350
1-877-844-0884

This document was last modified on June 21, 2006. Any subsequent changes made to the STI applications described herein will be discussed in the release notes that accompany each product's update.

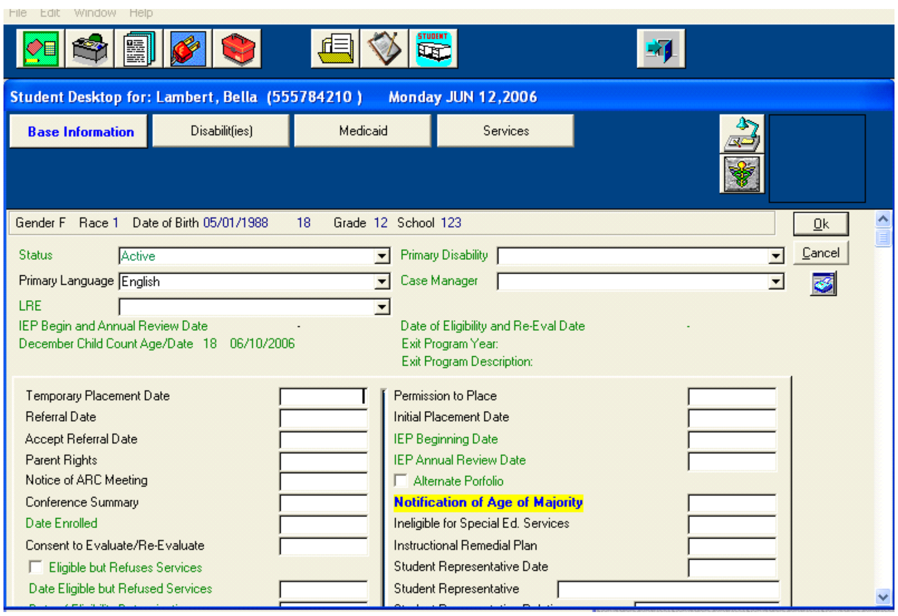
Contents

Start of Year Procedures

STISets Student Desktop - Student Folder – Base Information Screen

This data is displayed onscreen by default when the Special Education Folder is opened. Click the **Base Information** button at the top of the *Student Desktop* menu at any time to view or edit this information.

The *LRE* field on the *Base Information* screen has been altered in STISets v9.0 to accommodate changes in the LRE codes. The Age Range is no longer an option and the program will default to the appropriate options for ages 3-5 and 6-21. The new LRE codes are described in the *STISets 9.0 Data Standards* document. The *Other Placements* field is no longer displayed on the *Base Information* screen.



- *Temporary Placement Date*: If it is necessary to place the student in *Temporary Services*, enter the date on which this measure will begin in the field provided.
- *Referral Date*: Enter the date on which the student was originally referred for Special Education services.
- *Accept Referral Date*: Enter the date on which the Special Ed. *referral* was accepted by the Committee. The screening process begins on this date.
- *Parent Rights*: Enter the date on which *parent rights* were explained to the parent(s) of the Special Ed. candidate.
- *Notice of ARC Meeting*: Enter the date on which the parents returned a signed *Notice of ARC Meeting* form.
- *Conference Summary*: Enter the date on which the *Conference Summary* report was created.

- *Date Enrolled*: Enter the date on which the student enrolled in Special Education in the school district.

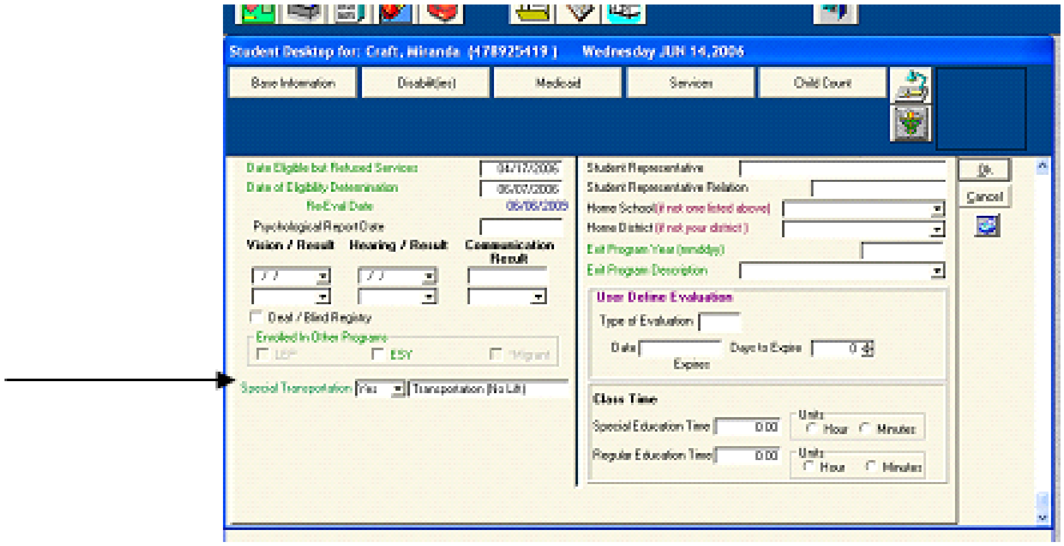
> Note: If a student were to move to another school district and then return, the *Date Enrolled* would be changed to the *current* date of enrollment. Enrollment dates do not change for students who move from school to school within the same school district.

- *Consent to Evaluate/Re-Evaluate*: Enter the date on which the *Permission to Evaluate* form was signed by a parent or guardian.
- *Eligible But Refuses Services*: Check this box to note a refusal of Special Education services. Then enter the date of refusal. These fields are green fields with 9.0v of STISets.
- *Date of Eligibility Determination*: Enter the date on which the student was declared eligible to receive Special Education services.
- *RE-Eval Date*: STISets automatically creates *the Re-Evaluation Date* by calculating three years from the *Date of Eligibility*.
- *Psychological Report Date*: Enter the date on which the psychological report was completed.
- *Vision, Hearing and Communication Test information*: Use the drop-down arrows to select the dates of vision, hearing and communication screenings. In the fields below the dates, use the drop-down arrows to select the screening results*; Passed, Failed, Cannot Test or Refused.*

> Note: In order for vision and hearing *dates* to be available in the drop-down list, these dates must have already been entered in the *STIHealth.*

- *Deaf / Blind Registry*: Check this box if this student is included in the *Deaf / Blind Registry*.
- *Enrolled in Other Programs*:
    - *LEP*: This box will be checked if the student uses *English* as a *Second Language*. This box is checked or not checked from data provided by STIOffice LEP field.
    - *ESY*: Check this box if the student requires an *Extended School Year*.
    - *Migrant*: This box will be checked or not checked from data provided by STIOffice Migrant field.
    - *Special Transportation:* This box will default to NO unless the user selects Transportation (with lift) or Transportation (without lift) as a Related Service. If Transportation is selected as a Related Service, the field will be marked YES.

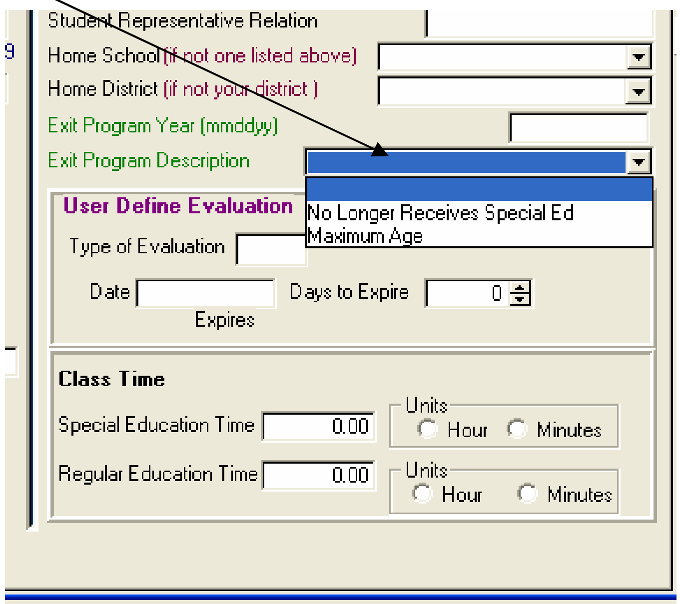
- *Type Special Education Transportation:* If Special Transportation is selected as a Related Service, this field will display Transportation (with lift) or Transportation (without lift).



- *Primary Disability:* The primary disability is a green field. The disability is selected from a drop-down field. Once the user selects the disability, the user will be asked if this disability will be the December 1 Count Disability. After answering this question, the program will open to the Disability Screen for entering data.
- *Case Manager:* The case manager for the student is selected from a drop-down box listing employees entered in STISets. With STISets 9.0, this is a required green field.

- *Permission to Place*: Enter the date on which the *Permission to Place* form was signed by a parent or guardian.
- *Initial Placement Date*: Enter the date on which the student was initially placed to receive Special Ed. services. If the student has previously been enrolled in Special Education, enter the initial date of entry.
- *IEP Beginning / Annual Review Date*: Enter the beginning and ending dates of the IEP. A completed IEP will auto populate these fields.
- *Alternate Portfolio*: This checkbox may be defaulted from a completed IEP form or if the user does not use the IEP form it may be manually selected in the base information section.
- *Notification of Age of Majority*: Enter the date on which a *Turning Age Notice* form was sent.
- *Ineligible for Special Ed Services*: Enter the date on which the student was declared ineligible for Special Education services, where applicable.
- *Instructional Remedial Plan*: If a student is declared ineligible for Special Education services, an *Instructional Remedial Plan* must be developed. Enter the date on which this plan will take effect.
- *Student Representative Date*: (if applicable) Enter the date on which a parent or guardian has given written authorization allowing another individual to act as the authority for the student in educational matters.
- *Student Representative*: (if applicable) Enter the name of an individual other than the parent or legal guardian who represents the student in educational matters.
- *Student Representative Relation*: Enter the relationship of the Student Representative to the student.

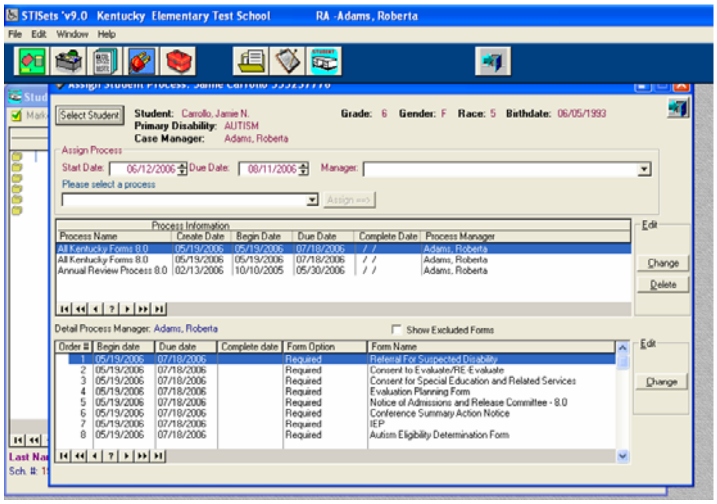
- *Home School*: If the student's home school is not listed at the top of the menu, use the drop-down box to select the correct school. This scenario could occur if the student is receiving Special Education services from a school other than his/her actual home school.
- *Home District*: If the student's home school is located in another district, select it from the drop-down list.
- *Exit Program Year:* Enter the month, day and year in which the student exits the Special Education program.
- *Exit Program Description:* Click the drop-down arrow to select the Exit Program Description.



- *User Define Evaluation*: Use this field to enter information about any customized (user-defined) type of evaluation.
  - *Type of Evaluation*: Enter the type of evaluation, using a shortened code (up to five characters only). For example, *Init* for *Initial*, *ReEv* for Re-Evaluation, etc.
  - *Date*: Enter the date of the evaluation, then press the *Tab* key.
  - *Days to Expire*: Enter the number of days until the evaluation expires and press the *Tab* key again. The program automatically calculates the evaluation expiration date based on the figure entered here. To move the number of *Days to Expire* up or down, click the arrows onscreen or press the *Up*/*Down Arrow* keys on the keyboard.
- *Class Time*: Use this field to enter the units of time the student spends in Special and Regular Education.
  - *Special Education Time*: Enter the amount of *Time* per week the student will receive Special Education instruction. Then designate the manner in which this figure is measured: either *Hours* or *Minutes*. This and the following field should correlate with the parameters specified in the *LRE*.
  - *Regular Education Time*: Enter the amount of *Time* per week the student will receive Regular Education instruction. Then designate the manner in which this figure is measured: either *Hours* or *Minutes*.

Assign Student Process Desktop

Once a Special Education Folder has been created for a student, the student can be assigned a Special Education process. The process assignment will then attach the forms necessary to complete that process to the student record. These forms can be filled out and printed from the *Forms* section on the student desktop. For more information, see “Form Options in Student Desktop” on page 12.



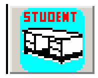
Assigning the Student Process

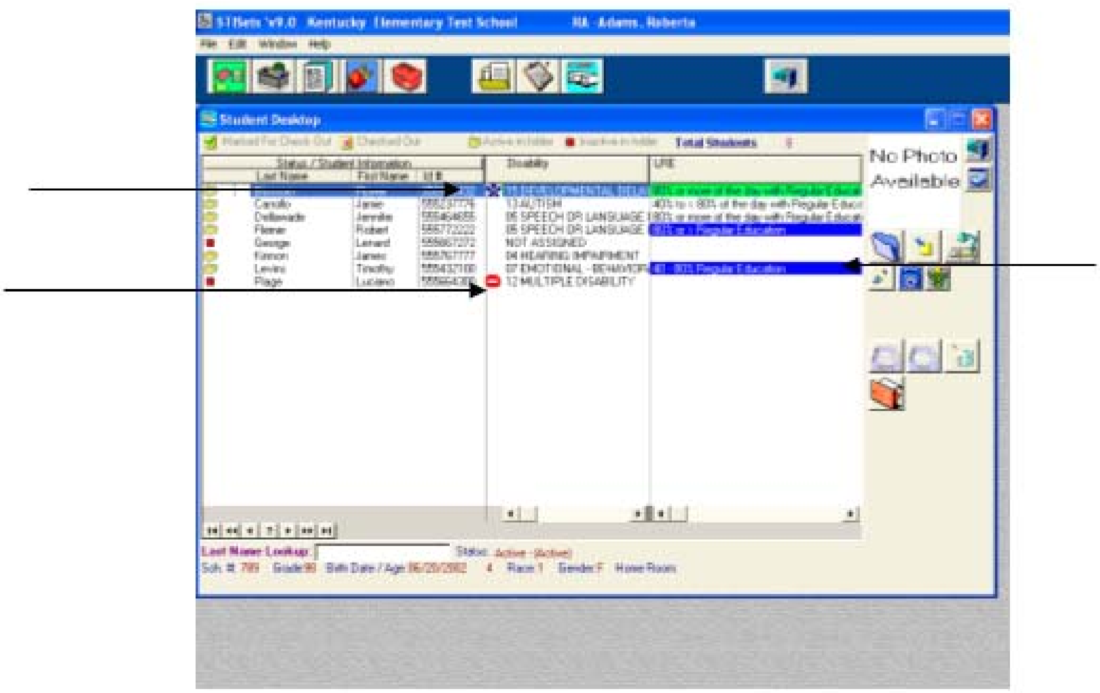
- To assign a Special Education process to a student, click the Assign Student Process  icon on the STISets desktop to bring up the *Student Process Desktop*.
- Click the Select Student button. The *Select a Student* dialog box will display. Select/highlight the student’s name and click the Select button.
- Select a Manager from the drop-down menu.
- Select a process from the drop-down menu; below “please select a process”.
- Click the **Assign** button located to the right of the drop-down menu.
- The proper forms for that process will appear onscreen, in a section called “Detail Process Manager” that will monitor the progress of the process.
- The **Change** button, located to the right of the list of forms, can be used to set up each form. The person assigning the process should address the following items:
- Form Option (required/optional)
- Begin/Due/Complete Date
- Process Detail Manager
- Maximum Occurrences: Enter the maximum number of times an individual form can be inserted. For most forms this will be “0” which will allow the user to create as many as needed.
- Exclude form: If there is a form that is not needed to address the student’s need, it can be marked *Exclude Form*. Excluded forms will not appear on the Teacher Desktop when it comes time to complete the form.

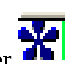
<u>Note</u>: Once a process has been assigned to a student, the forms associated with that process must be completed within the **Student Desktop | Forms** utility.

Student Desktop

While all students are listed in the *Creating Special Ed Folder Record* menu, the *Student Desktop* menu contains only Special Education students. Any students for whom Special Education Folders have been created will be listed in the Student Desktop browse box, regardless of status. The Student Desktop will default to display students with an active or referred status.

- To open *Student Desktop*, click the  icon.
- To work on a student's record, first select the student in the browse box by clicking a single time on that student's record to highlight it. Once a record appears highlighted in the browse box, any buttons clicked in *Student Desktop* will open menu options for that particular student.



- With the changes in the LRE codes with the 9.0 STISets, students with pre 9.0 LRE codes will display with the LRE code highlighted in blue.
- The blue flower  next to the disability on the Student Desktop screen indicates that the student is inactive in STIOffice. This may mean that the student is a future enrollee or not enrolled through enrollment.
- The red stop sign  next to the disability on the Student Desktop screen indicates that the student has been withdrawn from STIOffice.

Navigating the Browse Box in Student Desktop

There are three ways to browse the student list in order to select a student:

- Click once in the browse box and use the *up* and *down arrow* keys on your keyboard.
- Type the first few letters of a student's last name in the *Last Name Lookup* box below the browse box. Then press the *Tab* key.

- Click once in the browse box and use the *VCR* arrow buttons in the left corner below the list to jump forward or behind a set number of spaces in the list. The first and last *VCR* arrow buttons will move to the very first student or the very last student, respectively.

Student Desktop Features

Student Desktop contains many options. Selecting this icon will allow the user to:

- Maintain or edit Special Education Folders, once these folders have been created via **Create Folder Record**.
- Coordinate the Special Education process from the *Initial Referral* through all required stages.
- Create and maintain *IEP's* for students.
- Quickly view student and guardian demographic information, such as a student's home phone number, attendance record or discipline infractions.

Maintaining Special Education Folders

- All students who have Special Education folders will be listed in the browse box at the top of the *Student Desktop* menu. The Student Desktop will default to display students with Active and Referred Status. To view or edit Special Education folder information, select a student in the browse box and click the  (*Special Education Folder*) icon to the right of the browse box.
- For detailed descriptions of the fields in the Special Education folder, see "STISets Student Desktop - Student Folder – Base Information Screen" on page 1.

STIOffice Information in Student Desktop

Select a student in the *Student Desktop* browse box and click the STIOffice  icon to view student data generated from the following categories in STIOffice:

- Student/Guardian Information
- Entry/Withdrawal
- Attendance
- Discipline
- Schedule
- Grades

To view the STIOffice categories, scroll down the screen for the desired category. This data is available on a *read-only* basis; no modifications may be performed to STIOffice data from within STISets.

> Note: If *Schedule* is selected, the user has the option to view schedule information for any valid *Term*. If *Grades* is selected, the user has the option to view grade information for any valid *Term*. Grades from terms in a previous academic *Year* may be viewed as well, if this information is available in the STIOffice database.

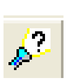
Student Desktop Reports

This selection is available only for users with a **Teacher Desktop**.

Click the  icon to view the *Student Desktop Reports* menu. This feature allows the user to generate reports from Student Desktop.

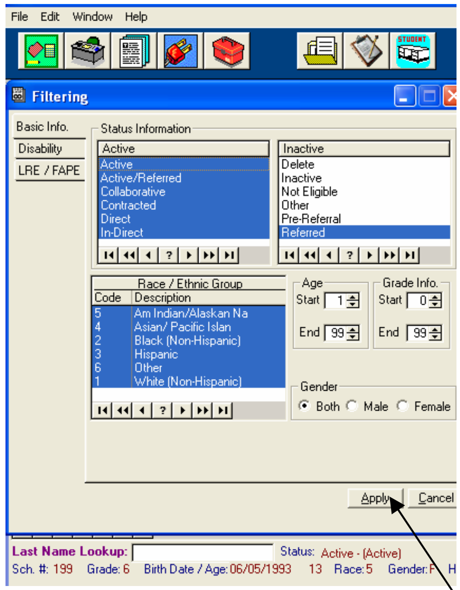
- Student Information
  - Student Listing: Generates a list of all the user's students.
  - Student Guardian: Generates a list of student guardian / emergency contact information for all Special Ed. students assigned to the user.
  - Student Discipline: Generates list of students and their infractions.
  - Student Attendance: Generates attendance list for students.
- Group 2
  - Caseload: Generates class roster list of active students assigned in the Disabilities Tab, Special Education Services and Related Services.
- Annual/Re-Evals
  - Annual Review: The user will be prompted to pick one of three lists that can be generated
    1. All Dates: Students are listed in alphabetical order.
    2. Dates Within Specific Range: Set the dates to generate list of students with Annual Reviews scheduled within the specified date range.
    3. Month (Or Range of Months): Set the months to generate list of students with Annual Reviews scheduled within the specified months.
  - Psyc. Review Date: Generates list of Psychological Report dates for all students assigned to the user.
  - Eligibility Date: The user will be prompted to pick one of three lists that can be generated.
    1. All Dates: Students are listed in alphabetical order.
    2. Dates Within Specific Range: Set the dates to generate list of students with Eligibility Review Dates scheduled within the specified date range.
    3. Month (Or Range of Months): Set the months to generate list of students with Eligibility Review Dates scheduled within the specified months.
- Child Counts
  - Simple List: Generates Simple Child Count Listing for user.
- Labels
  - Labels: Allows users to generate labels.

Student Desktop Browse Box Filter

Click the  (*Desktop Filter*) icon to view filtering options. This feature is used to restrict or expand the list of Special Education students that is viewable in the browse box at any given time. Changing the filter settings does not modify data in any way, so the user should feel free to tweak filter options as desired. Restricting filter parameters is a useful way to work on selected groups of students at one time.

> Note: If, at any point, a particular student record does not appear in the browse box, check the filter settings to make sure that the student has not been excluded from the onscreen display. Exiting out of the Student Desktop will reset all filters.

When the  icon is clicked, the *Filtering* dialog box will appear and display all available filter settings. Filters can be set based on the following: Status, Race/Ethnic Group, Age, Grade, Gender, Disability, or LRE/FAPE.

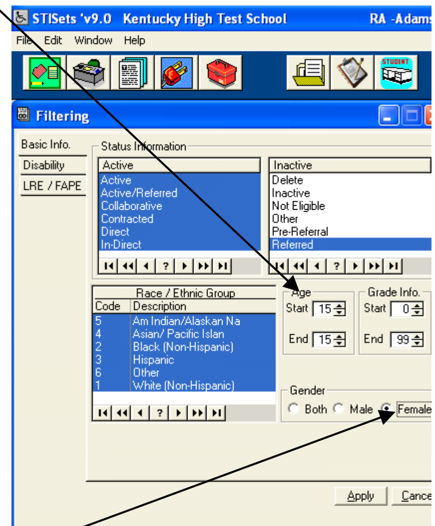


- To enable a filter setting, highlight the criteria(s) desired and select **Apply**.
- The total number of students currently displayed at any given moment is shown at the top of the menu, above the student browse box, in the *Total Students* field.
- Thirteen student *Status* filters are available in the upper section of the screen. The six filters in the *Active Status* column include students who will be included in *Child Count*. The *Referred* filter in the *Inactive Status* column also includes students who will be included in *Child Count*. These filters are automatically enabled each time *Student Desktop* is opened.
  - The rest of the *Inactive Status* filters will include students who *are not* included in Child Count. However, students with any of these inactive statuses will remain in the Special Ed. database, unless their records are completely deleted.

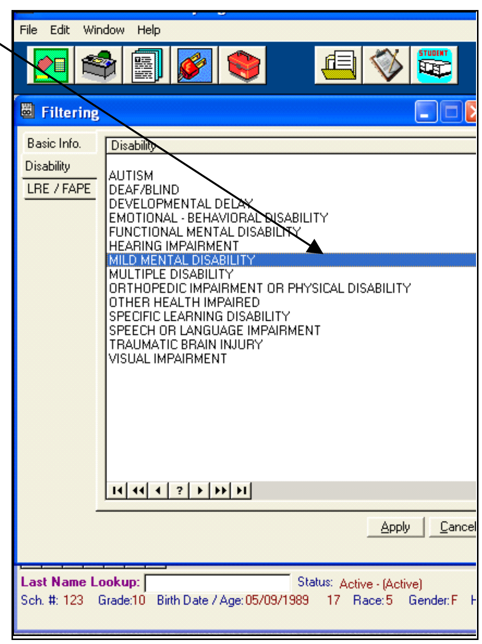
By combining various filter options, the user can set virtually any parameters for the list of students to be displayed in the browse box.

- *Example*: Perform the following steps to display all *Active* female students who are *15* years old and who have a *Primary Exceptionality* of *Mild Mental Disability*.
  - In *Student Desktop*, click the  (*Desktop Filter*) icon.

- In the section labeled *Age*, set the Start and End Age at 15.



- In the section labeled *Gender*, check the box next to *Female*.
- Click the *Disabilities* tab. Highlight *Mild Mental Disability* and right-click. Select **Reverse** so that *Mild Mental Disability* is the only disability highlighted.

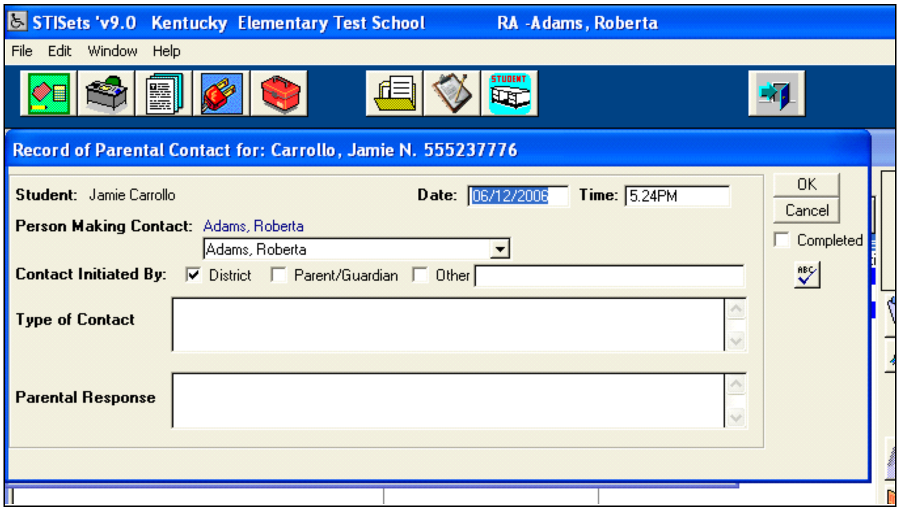


- Verify that all *Active* statuses are highlighted, click **Apply**.
- The browse box displayed will change to show the specified range of students.

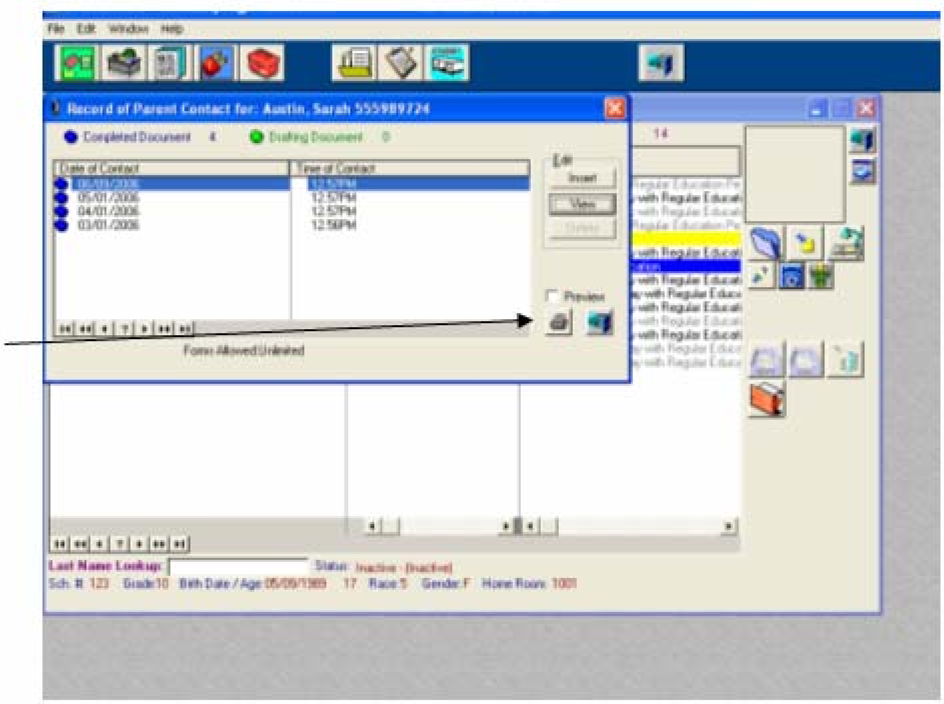
Parent Contact Icon

The Parent Icon  is located on the Student Desktop.

- To enter Parental Contact information, select **Insert**.

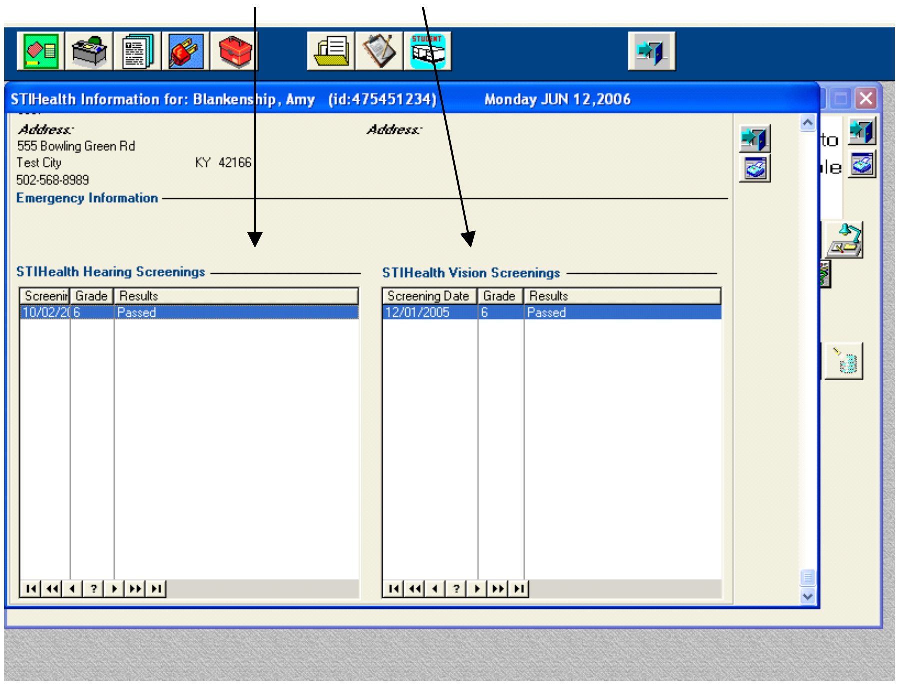


- To print the Parent Contacts, select the printer icon, enter the date enter the desired date range and all parent contacts within the selected date range will be printed with the most current parent contact appearing at the top of the page.



STIHealth

Select a student and click the STIHealth  icon to view *Hearing* and *Vision Screening* data. This screen includes Student/Guardian information as well as STIHealth Hearing and Vision Screenings and Results. This information is read-only.



Generating Special Education Forms

Form Options in Student Desktop

The **Forms** feature allows Case Managers to maintain individual processes associated with the students. In order to maintain forms, a specific Process must be assigned through the **Assign Student Process Desktop**. For details about this feature, see "Assign Student Process Desktop" on page 5. Processes assigned to each student will be chronologically displayed with the most current Process at the top.

Inserting Forms

- Select the desired student in **Student Desktop** and click the  button.
- The student's process details window will appear.
- Select the appropriate *Process*.
- Click on the desired form listed in the bottom section of the window.
- Click the forms  icon to open the *Insert/Change/Delete* screen.
- Click **Insert** (note that a new form cannot be inserted until the previous one has been marked *Completed*). This screen allows the user to preview and/or print the form at any stage.
- The status of each form is indicated by a green dot (draft) or a blue dot (complete).

- Complete the form as directed.

Form/Process Details

To change details about each form (*Due Date*, *Manager*, etc), double-click on the appropriate form and adjust the information.

Printing Forms

- Printing may be completed at the completion of each form or at the completion of the entire process.
- Forms may be printed from the *Insert/Change/Delete* screen.
- Processes/individual forms can be previewed and/or printed from the *Process Details* screen by selecting the printer icon and using the filter buttons below to print desired processes/forms. Only forms that have been created within the highlighted process will appear on this screen.

Processes and Related Forms

The following processes and related forms have been RECOMMENDED by KDE. Each Process contains all forms needed to complete and track student progress. The All Kentucky Forms Process defaults to display all 23 forms. Although the other Processes contain all 23 forms, these Processes will default to display the forms that are recommended by KDE to be appropriate for that Process. Additional forms can be added to the displayed forms of a Process by selecting Assigning Student Processes, highlighting the Process to be modified, and putting a check in the box “Show Excluded Forms”. After Show Excluded Forms is checked, all 23 forms will be displayed. Select the forms to be added, click on the Change button, and take the check out of the “Exclude Form” box. Repeat this procedure for all desired forms. When all changes have been made, remove the check from the “Show Excluded Forms” box. The Process should now contain all desired forms.

All Kentucky Forms Process

- Referral For Suspected Disability
- Consent to Evaluate / Re-Evaluate
- Consent for Special Education and Related Services
- Evaluation Planning Form
- Notice of Admissions and Release Committee – 8.0
- Conference Summary Action Notice
- IEP
- Autism Eligibility Determination Form
- Deaf Blind Eligibility Determination
- Developmental Delay Eligibility Determination
- Emotional-Behavioral Disability Eligibility Determination
- Functional Mental Disability Eligibility Determination
- Hearing Impaired Disability Eligibility Determination
- Mild Mental Disability Eligibility Determination
- Multiple Disability Eligibility Determination
- Orthopedic Impairment Eligibility Determination
- Other Health Impaired Eligibility Determination

- Specific Learning Disability Eligibility Determination
- Speech or Language Impairment Eligibility Determination
- Traumatic Brain Injury Eligibility Determination
- Visual Impairment Eligibility Determination
- Record of Access
- Record of Parental Rights
- Record of Parental Rights

Annual IEP Review

- ARC Meeting Notice
- IEP
- Conference Summary Action Notice

Initial Evaluation Process

- Referral For Suspected Disability
- Consent to Evaluate / Re-Evaluate
- Consent for Special Education and Related Services
- Evaluation Planning Form
- Notice of Admissions and Release Committee – 8.0
- Conference Summary Action Notice
- IEP

Miscellaneous Forms

- Record of Access
- Record of Parental Contact

Re-Evaluation Process

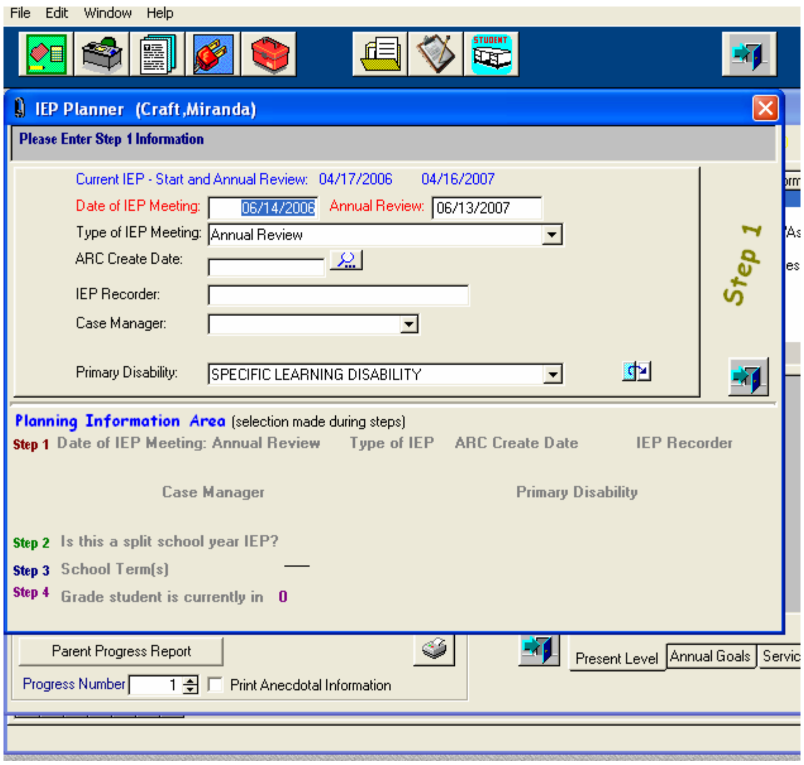
- Consent to Evaluate / Re-Evaluate
- Consent for Special Education and Related Services
- Evaluation Planning Form
- Notice of Admissions and Release Committee – 8.0RC Meeting
- Conference Summary Action Notice
- IEP

IEP Form / Creating an IEP

New to STISets 9.0 – When the user selects Process Forms, IEP; the program will default to "show all IEPs". If the user wishes to create an Addendum to the current IEP, which was created in a previous Process, this may be done in the current Process. Both the Addendum and the original IEP will now appear in the current Process.

<u>A word about *icons* in the *IEP Planner*</u>: Blue, green, red and yellow circle icons are used in IEP Planner to mark the *Status* of every IEP document. An icon legend at the top of the menu defines the various icons. IEPs that have a *Completed* or *Locked* status cannot be modified.

- If an existing, incomplete IEP is displayed, select the IEP and click Change. Enter the appropriate information to complete the IEP. All previous IEP's must be completed before a new IEP can be created.
- Click the **IEP Planner** button to create a new IEP, *Step 1* of the *IEP Planner* will appear.



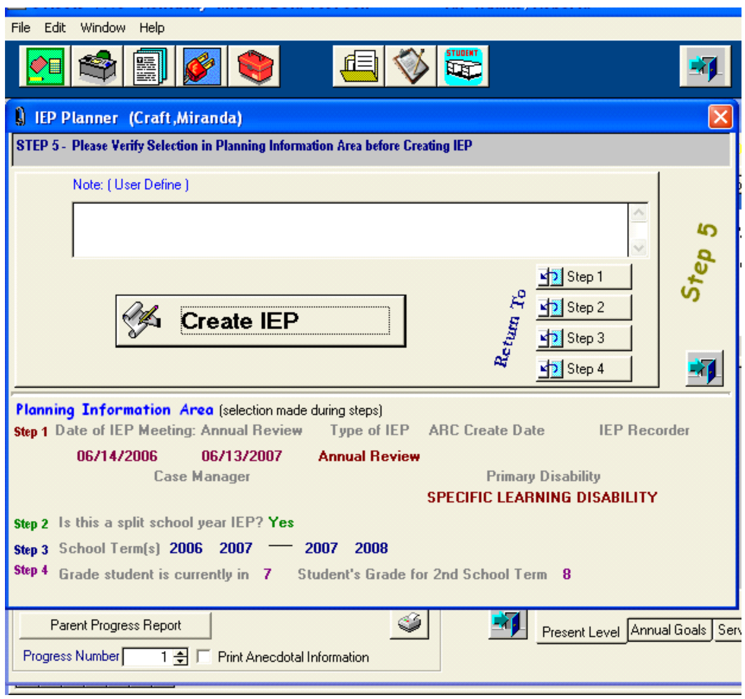
- The *Date of IEP Meeting* will default to today's date, with the *Annual Review* automatically scheduled for one year minus one day. This date range may be changed if necessary.
- Use the drop-down menu to select the *Type of IEP Meeting*, either *Annual Review* or *Initial*.
- Enter the *ARC Create Date* or click the ellipses  icon to choose from ARC Meeting dates already completed.
- Fill in the other information in Step 1 and click the Next Step  icon to move to the next step.

The section of the menu below the data entry field in IEP Planner displays a summary of the four steps in the IEP creation process. As data is entered above, it fills in the summary below.

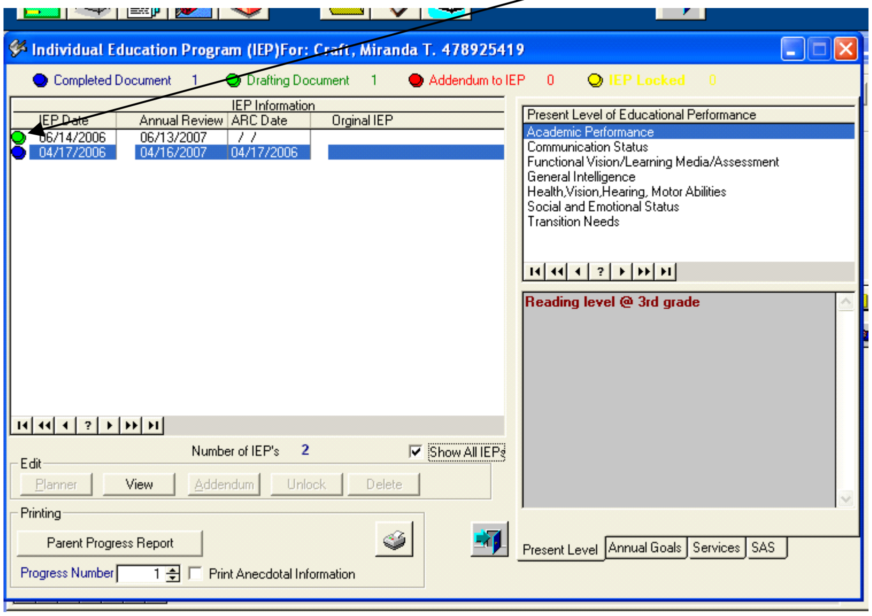
- In *Step 2*, use the drop-down arrow to answer the following question: *Is this a split school year IEP?* The answer will determine the number of terms displayed in *Step 3*. Click the Next Step icon to move to the next step.

> The *Split Year* status of an IEP may be changed after creation. To do this, the user should change the year for the first school term on the student's IEP. A prompt will then appear which will allow the user to select whether or not the IEP is split-year.

- *Step 3* will prompt the user to enter the beginning school year. The current year will appear by default. If this is correct, click **Set Dates,** then click the Next Step icon to move on to *Step 4*.
- If the answer to Step 2 was *Yes*, *Step 4* will give the user the option to mark the student in the same grade for both terms. Check the box to do so, or enter the *Student's Grade for the 2nd School Term*. Click the Next Step icon to move to *Step 5*.
- User notes may be entered in *Step 5*. User notes will not be displayed on the printed IEP. Look over the data in the *Planning Information Area*.
- Click any of the *Return To…* buttons to make corrections to previous Steps. When all data has been entered correctly, click **Create IEP**. Click any of the *Return To…* buttons to make corrections to previous Steps. When all data has been entered correctly, click **Create IEP**.

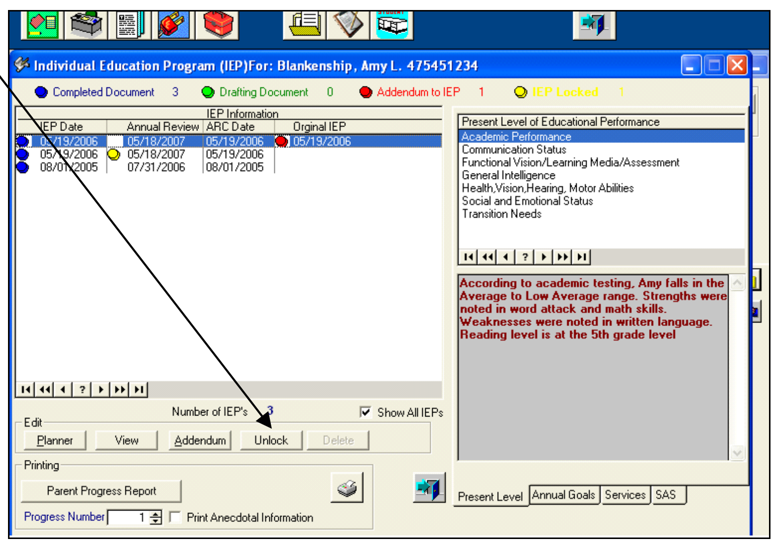


- The IEP is now a Drafting Document and is noted by the green dot to the left of the IEP Date.



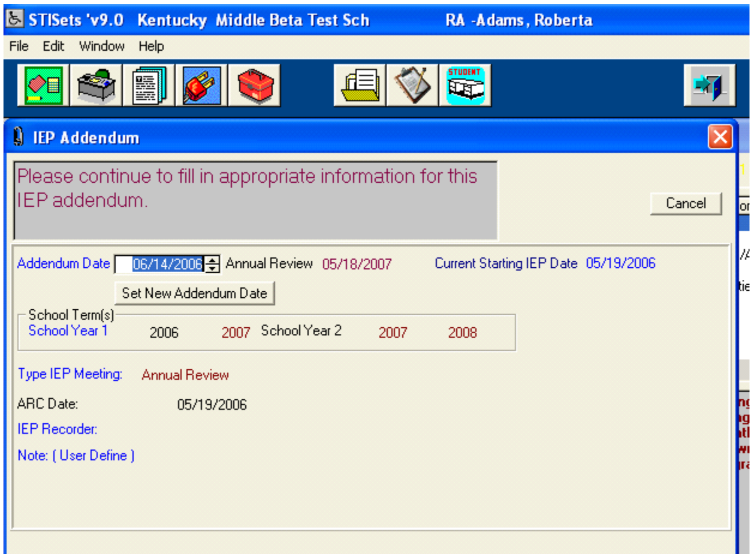
Other IEP Options

- View: Clicking the View button allows the user to view information contained within the completed IEP.
- Unlock: Click this button to unlock a completed. An "Unlock IEP?" dialog box will appear and request three pieces of information: Information to be Changed, Description of Updated Information and Reason for Change. Fill in these three sections and click **OK**.



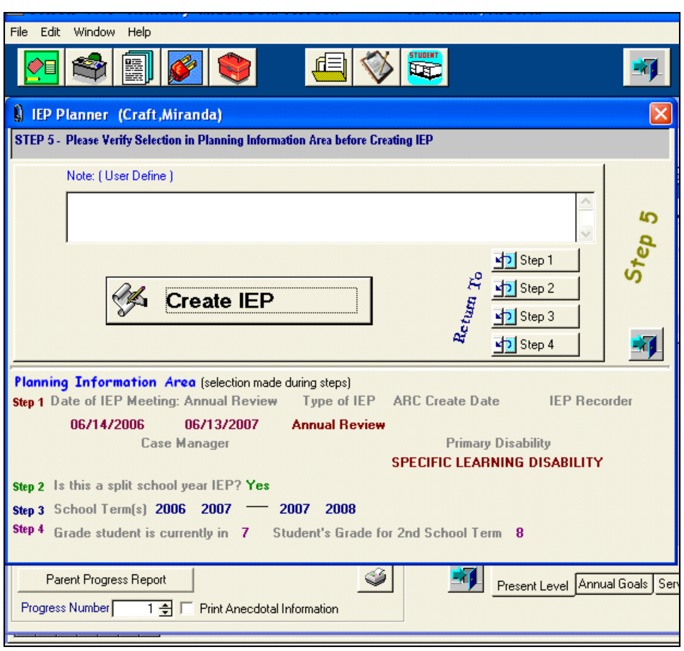
  - Note the once Completed IEP is now a Drafting Document.
  - IEP Addendum: Click this button to create an Addendum to the current completed IEP. A dialog box will display and ask the user the following question: "This will create an addendum to the most recent IEP dated ## / ## / ####. Do you wish to continue?"

- o The IEP Addendum screen will appear. The Addendum Date automatically defaults to today's date. Once the appropriate date is entered, click the Set New Addendum Date.



- o A Create Addendum button will now appear at the top of the screen. Click this button to create the addendum.

- Some key points regarding *Addendums*:
  - o When an addendum is created, the IEP to which it is attached will become *Locked*. The addendum itself will have *Draft* status.
  - o All data in the IEP is copied to the addendum except the progress report.
  - o Modifications may be made to the addendum by clicking the change button.
  - o Addendums may only be created once per IEP and only on the most current IEP. The next addendum will be attached to the new IEP created by the last addendum.



IEP Data Entry (Post-Creation)

The bulk of a student's IEP data may be entered during the creation of the IEP record, but sometimes it is necessary to add or modify IEP information. If the IEP has been completed, an Addendum should be created; if the IEP has remained in *Drafting Document* status, it may be modified directly.

To enter data into an IEP record after the IEP has been created and saved in *Drafting* status, choose a student in the *Student Desktop* browse box and click the Forms icon. Then select *IEP* from the *Forms* menu and click the Forms icon to the right. Make sure the correct IEP record is selected in the browse box and click **Change** to enter or modify data. The IEP Main Page Screen will appear. To navigate from page to page, click the radio buttons across the top of the page. Each page is described below.

Spell Checker

This feature is available for use with all forms in the *Student Desktop*. *Microsoft Word* must be installed on the local workstation in order for the spelling checker utility to run.

To use the spelling checker, simply click the icon, located at the top of the menu, after the data has been entered.

> Example: The IEP *Main* Page screen provides a space in which the user may enter a *Note*. This note may consist of just one or two phrases, or the user may enter an entire paragraph. After the note has been entered (but before **OK** has been clicked to save the record) click the icon and *Microsoft Word* will run this procedure on all text displayed onscreen. Any misspelled or unknown words will be presented to the user, along with correction suggestions.

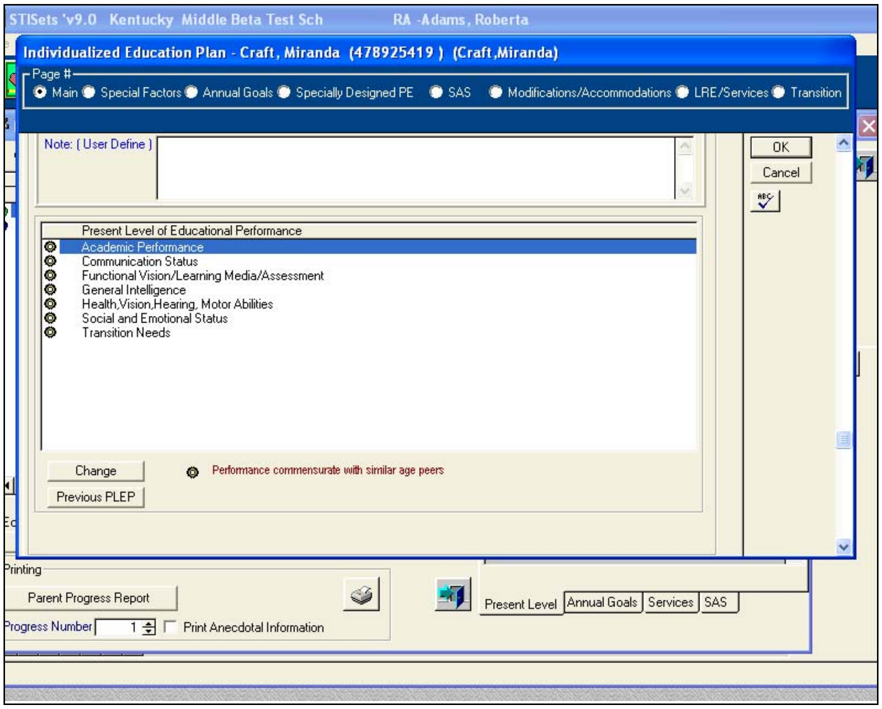
Main Menu

Nearly all the data fields in this screen are pulled from information entered during the creation of the IEP. This data may be modified here as desired.

A *Note* field is provided to allow the user to enter any additional information.

Present Level of Educational Performance

Each item listed in the browse box on this screen has a *Performance commensurate with similar age peers* icon, by default. There are two ways to enter information into this section of the IEP: through the **Change** or **Previous PLEP** button.



To enter data through the **Change** button, the user should follow this procedure for each area of performance selected:

- Click the **Change** button. In the menu that appears, the user may choose to uncheck the *Performance commensurate with similar age peers* box and enter PLEP information or leave it checked.
- A *PLEP Bank – Drag & Drop* is available in this menu, along with *Performance Areas Detail (View Only)*. Drag and drop any applicable *PLEP Bank Codes* (detailed descriptions of which are provided in the *Performance Areas Detail (View Only)* section) from the *PLEP Bank* field into the *Present Level of Performance* field. Click **OK** to save the information.
- The *Performance commensurate with similar age peers* icon will no longer appear next to the item in the list.

PLEP Bank Codes that are used here may be entered or modified in the ***Utility Desktop* | *Code Desktop* | *Kentucky - Codes*** | Present Level of Educational Performance Bank.

To enter data thru the Previous PLEP button, the user should follow this procedure for each area of performance selected:

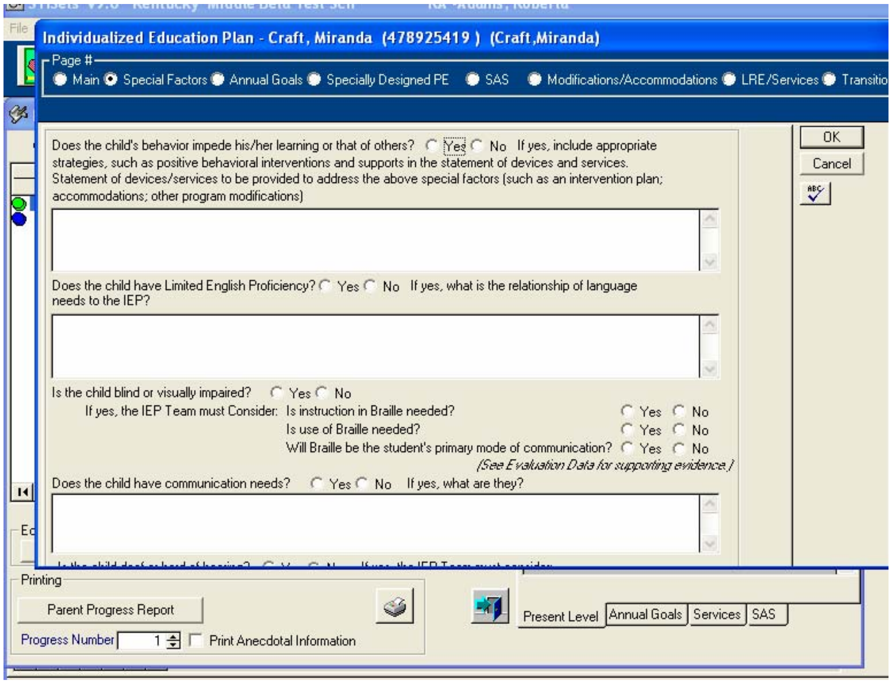
- Click the **Previous PLEP** button.
- Place a checkmark in the box beside the PLEP sections you wish to copy. Select **All** or choose **Clear All** to select all areas or clear all areas.
- Click **OK**.
- When the desired PLEP areas of performance have been copied, the user should then make needed changes to that PLEP area.

Note: When using the **Previous PLEP** option, the user should copy first and then make additions to the PLEP. The copying option will overwrite any existing data in this area.

Special Factors: IEP

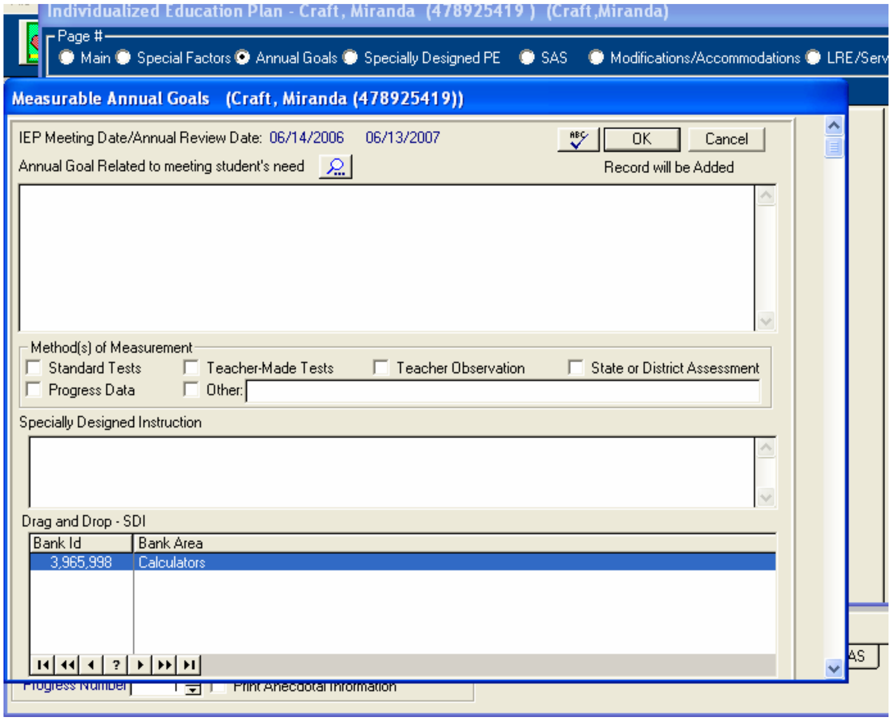
This screen is used to store information about the *Consideration of Special Factors for IEP Development*. The menu displays questions about mitigating factors such as *Limited English Proficiency*, *Visual Impairments, Communication Needs*, etc. Space is provided to describe the impact of each factor on the student's IEP.

By default, Yes/No are not selected and therefore all questions must be addressed in order to complete the IEP.



Annual Goals: IEP

This screen contains information about *Measurable Annual Goals* and the *Benchmarks/Short-Term Objectives* that comprise these goals.



Measurable Annual Goals

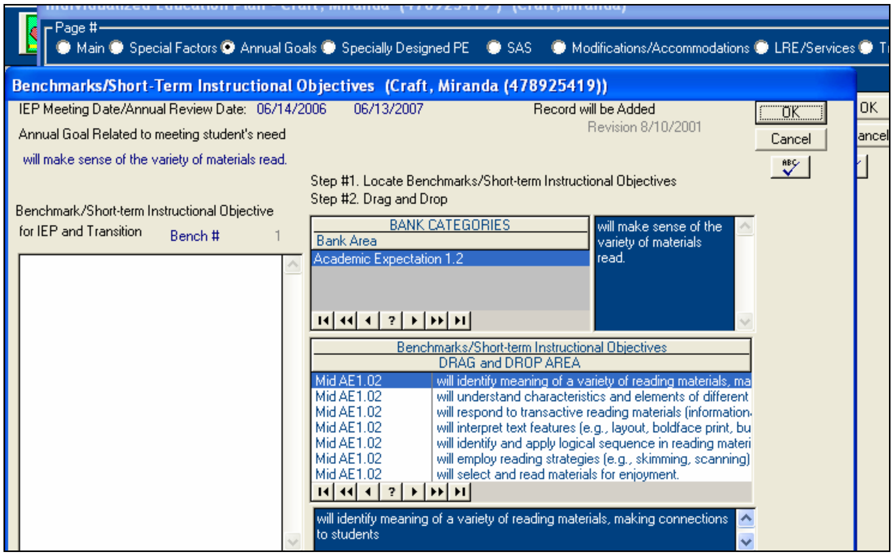
To insert a goal, click **Insert** under the *Measurable Annual Goals* browse box.

- Click the magnifying glass  icon to choose from the pre-defined list of *Annual Goals*, which are grouped according to *Bank Code*. A summary of the goal is listed below in the green window. Click Select after choosing a goal from the bank.
- Place a checkmark in the checkbox beside each appropriate *Method(s) of Measurement.*
- *Specially Designed Instruction (SDI)* entries can be entered in the text box or from the *Drag and Drop – SDI* box below.
- Click **OK** to save the information entered.

SDI Bank Codes that are used here may be entered or modified in the **Utility Desktop | Code Desktop | Kentucky - Codes | Specially Designed Instruction Bank**.

Benchmarks/Short-Term Objectives

When the Measurable Annual Goal, with Methods of Measurement and Specially Designed Instruction, has been entered, the user should enter benchmarks specific to that Goal.



- <u>Benchmarks/Short-Term Objectives</u>: Select this tab and click **Insert** to add a record to this field. *Benchmarks/Objectives* are set to correspond with annual goals under **Utilities Desktop | Code Desktop | Goals and Benchmarks**. These items come pre-installed with STISets, but the administrator has the ability to modify or add to these records.
  - A *Measurable Annual Goal* menu will appear. Note that this menu features a scroll bar on the far right side for navigation.
  - Drag & Drop the applicable *Benchmark(s)/Short-Term Instructional Objective(s)* from the *DRAG and DROP AREA* to the blank field on the left side of the menu.
  - Make changes or additions to the benchmark and click **OK** when finished.
  - Continue to enter benchmarks until finished. Click Cancel to exit the benchmark menu.

Specially Designed PE: IEP

This tab is used to enter information for *Specially Designed Instruction* in Physical Education for applicable students.

By default, *No* is selected for the item *Does the student require specially designed P.E.?* If this value is correct (in other words, if the student does <u>not</u> require specially designed instruction in P.E.), this screen may be skipped.

If the student does require special P.E. instruction, check *Yes* here and then select the appropriate items on the form and/or enter the appropriate information in the spaces provided.

SAS: IEP

Supplementary Aids and Services (SAS) information may be entered into this text box or by using the Drag & Drop bank below.

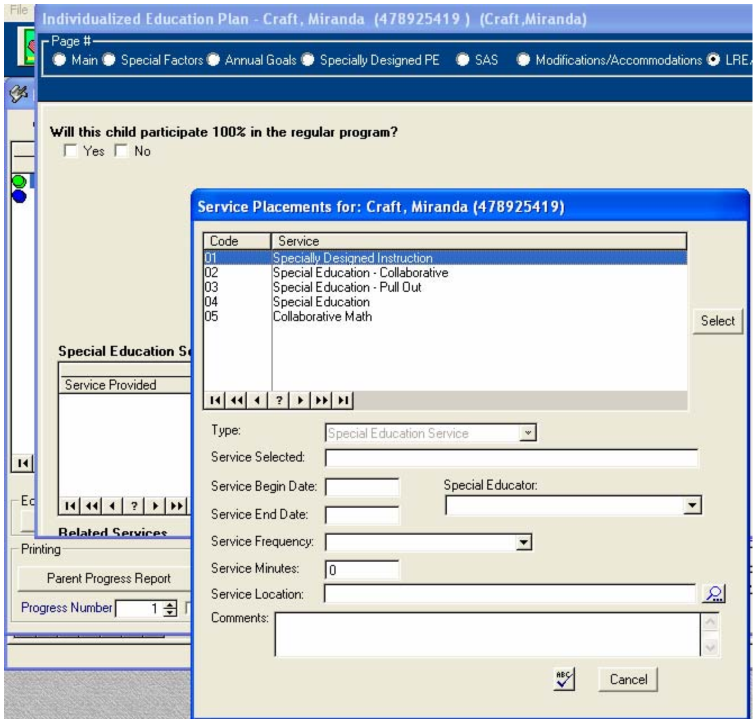
> SAS Bank Codes that are used here may be entered or modified in the **Utility Desktop | Code Desktop | Kentucky - Codes | Supplementary Aids and Services Bank**.

Modifications/Accommodations: IEP

Individual Modifications in the Administration of Assessments and in the Classroom are addressed in this section.

LRE/Services: IEP

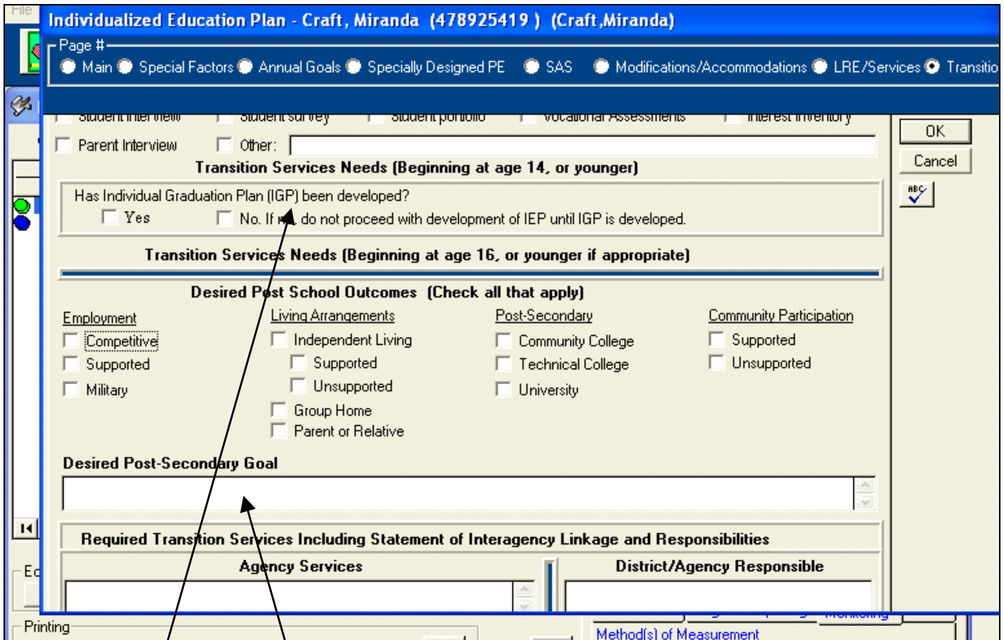
This screen is used to enter information about *LRE* and *Special Education/Related Services.*



- "Will the child participate 100% in the regular program?" If NO is selected a text box will appear.
- Click **Insert** and enter a Class, along with the extent to which the student will not participate in the class.
- Click **Insert** next to the *Special Education Services* browse box. Highlight the appropriate *Type of Service* and click the Select button. Enter any other applicable information and click **OK** to save.
- Click **Insert** next to the *Related Services* browse box. Highlight the appropriate *Type of Service* and click the Select button. Enter any other applicable information and click **OK** to save.

Transition: IEP

Transition Services must be addressed for those students who are 14 years of age or older during the period that the IEP is in affect.



- The question “Has Individual Graduation Plan(IGP) been developed?” must be answered for those students 14 years of age and older.
- Students 16 years and older must address Desired Post School Outcomes.
- Desired Post-Secondary Goal has a text box to enter the post secondary goal.

Saving IEP Modifications

After all information has been entered into the screens described above, check the box marked “Completed Document” and click **OK** in the upper right corner of the *IEP General Information* menu to save the information.

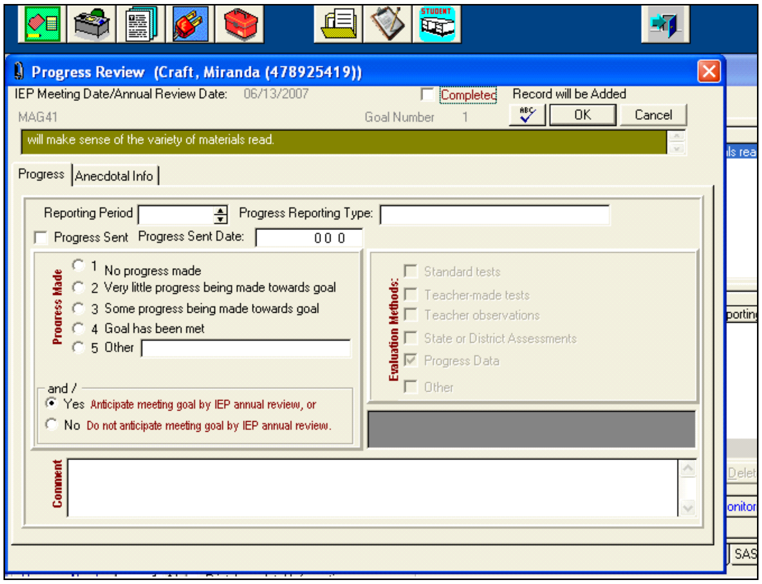
Tracking IEP Information

After any of the above information has been entered and saved from within the IEP, the user may select any IEP record from the *IEP* screen and click one of the following three tabs in the lower right corner of the menu to review: *Present Level*, *Annuals Goals* (which contains benchmarks, progress reporting and monitoring information), Services and SAS.

Annual Goals

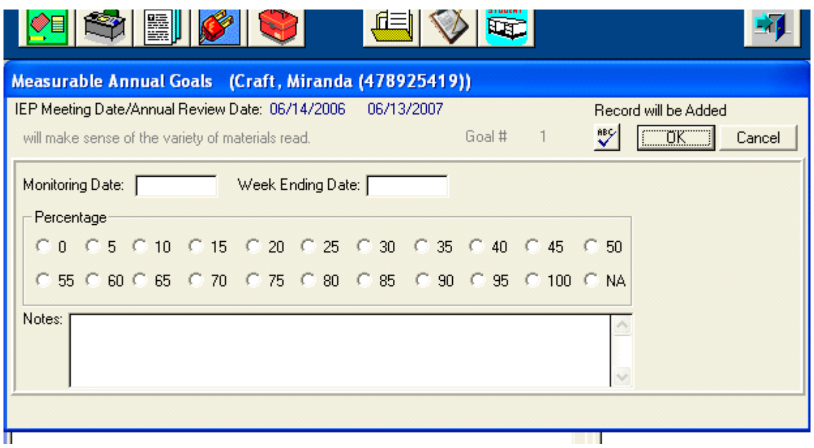
Three additional tabs are used to display information within the *Annual Goals* tab:

- Benchmarks: This is a read-only field. Any *Benchmarks* set up for the selected IEP will be displayed here.
- Progress Reporting: Select this tab and click **Insert** to add a record to this field. A *Progress Review* menu will appear. Enter the appropriate information in the fields provided and click **OK** when finished.



- *Progress Reporting Type* and *Progress Sent Date* are required fields. The record cannot be saved unless values are entered for these fields.

• Monitoring Progress: Select this tab and click **Insert** to add a record to this field. Enter the *Monitoring Date*, the *Week Ending Date*, and the estimated *Percentage* of the goal completed. Add any *Notes* if necessary, then click **OK** to save.



- Click the  (*Print Monitoring Information*) icon in the lower right corner of the *Monitoring* tab to generate an *IEP Progress Monitoring Record*. The user also has the option of printing a graph of the data entered through Monitoring for the highlighted goal.

Note: Progress report information must be input through the *Annual Goals* tab located on the IEP summary desktop.

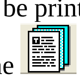
Printing IEP Information

- To print reports detailing information from any or all of the various IEP components for the selected student, make sure the correct IEP record is selected in the browse box and click the  (*Print Section or Entire IEP*) icon in the middle of the *IEP* menu. Then select which components to *Print* and/or *Preview*. The *Set Print* and *Set Preview* boxes under *Options* may be used to change all settings under *Print* or *Preview* to *Yes* or *No*.
- To print an IEP progress report to send to the selected student's parent/guardian, click the **Parent Progress Report** button displayed on the *IEP* desktop. The *Progress Number* should match the *Reporting Period* entered in the *Progress Review* menu.

Reports

Student Reports

A great amount of data is assimilated in the STISets program. Most information, whether state-required student data forms or "in-house" details about the school itself, can be printed in report form.

To generate any of a variety of student reports, click the  icon.

Student Reports Options

Note: This is a read-only utility; no data entry or modification is performed within the **Reports** utility.

The following report options are available:

Student Listings

- Alpha: Generates a list of all Special Ed. students in the district, in alphabetical order.
- Age: Generates a list of all Special Ed. students in the district, in order by school, then by age.
- Gender: Generates a list of all Special Ed. students in the district, in order by school, then by gender.
- Grade: Generates a list of all Special Ed. students in the district, in order by school, then by grade.
- LRE Generates a list of all Special Ed. students in the district, in order by school, then by LRE Code.
- Race: Generates a list of all Special Ed. students in the district, in order by school, then by race.
- Special Programs: Generates a list of all Special Ed. students in the district who have been placed in Special Programs, in alphabetical order.
- Exiting List: User will be prompted for a date range. Generates a list of all students who have exited the Special Ed. program within the specified period, in order by school. This report will only list those students who no longer receive special education services or who have reached the maximum age.
- Student Guardian: Generates a list of student guardian / emergency contact information for all Special Ed. students in the school.
- Student Labels: This option generates address labels for Special Education students. Select the Special Education *Status(es)* to include, then click the appropriate **Address Labels** button. The user may also modify the text listing to whom the labels are addressed; the default address is *To the Guardian of:*. Both line 1 and line 2 of guardian information in STIOffice prints on the student labels.

Miscellaneous

- Alternate Portfolio: Generates a list of students and indicates whether each student has Alternate Portfolio or not.
- Exceptionality by Last Name: Generates a list of students in alphabetical order, grouped by Primary Exceptionality Code.
- LRE by Last Name: Generates a list of students in order by LRE Code.

- Medicaid Info: Generates a list of Medicaid information for all applicable students.
- Medicaid Notification: Generates a list of Notifications for Medicaid billing dates for all applicable students.
- Not Eligible: Generates a list of students who are ineligible for Special Ed. services.
- Referred: User will be prompted to use the drop-down arrow to select a school. Then a list will be generated of all students attending that school with a status of Referred or Active/Referred.
- Remediation Plan: Generates a list of all Special Ed. students who receive remediation services.
- Turning Age Report: User will be prompted to enter a Turning Age and Date. For example, enter "15" for Age and "08/20/2001" to generate a list of all students who will turn 15 by August 20, 2001. Disability codes and Current Eligibility Dates are also listed.
- Caseload Projections: User will be prompted to use the drop-down arrow to select a Teacher. A list of Caseload Projections for that teacher will be generated. Only Active students are included.
- Caseload Related Services Totals: User will be prompted to use the drop-down arrow to select employee type. The user highlights the desired teacher.
- Students with Multiple Disabilities: Generates list of students with multiple disabilities by schools that constitute this category.
- Students with Secondary Disabilities: User will be prompted to choose whether they wish to view or print the report by School or by Primary Exceptionality. A list of all the students that constitute this category with Secondary Disabilities by School or Primary Exceptionality will be generated.
- Students with Sub-Category Disabilities: Generates a list of students with Disabilities which have Sub-Categories attached to them. The format is the same as the “Students with Multiple Disabilities” report.
- Related Service: User will be prompted to enter a Starting Date and an Ending Date. A list of all Related Services created within the date range will be generated. The related service report allows the user to use a variety of filters to create a report that reports needed information concerning related services.
- Transportation T5 Students: Generates report showing the special transportation T5 students. This report’s source of information is the data entered through STIOffice concerning T5 Students.

Annual Reviews

- All Reviews: A report of all students with Annuals Reviews scheduled will be generated. Students are listed in chronological order based on their IEP Begin and End Dates.
- By Date: User will be prompted to enter a date range. A list of all students with Annuals Reviews scheduled within the specified date range will be generated.
- By Month: User will be prompted to use the drop-down arrow to select a month. A list of all students with Annuals Reviews scheduled during the specified month will be generated.
- By Teacher / Month: User will be prompted to use the drop-down arrow to select a teacher and then a month. A list of all students assigned to the specified Teacher / Case Manager with Annual Reviews occurring during the specified month will be generated.
- Annual Reviews-Overdue: User will be prompted to use the drop-down arrow to select a date. A list of all students who have *Annual Review* dates that will be overdue on or before the specified date will be generated. Students are listed in chronological order based on *Annual Review* date.

> Note: As a precautionary measure, users may wish to run the *Annual Reviews-Overdue* report ahead of time to check for upcoming due dates.

Class Rosters

- Class Roster: User will be prompted to use the drop-down arrow to select a teacher. Choose the report options, including disability assignments to include and report sort order, then click **OK**. This report will include both primary and secondary class rosters.

Evaluation / Re-Evals

- PSYCHOLOGICAL TIME LINES - All Students: Generates a list of Evaluation / Re-Evaluation dates for all students.
- PSYCHOLOGICAL TIME LINES - by Date: User will be prompted to enter a date range. Generates a list of Evaluation / Re-Evaluation dates for all students within the selected dates. Other information displayed includes Status, Primary Codes and LRE Codes.
- ELIGIBILITY TIME LINES - All Students - Alpha: Generates a list of Evaluation / Re-Evaluation dates for all students. Other information displayed includes Status, Primary Codes and LRE Codes. Students are listed in alphabetical order.
- ELIGIBILITY TIME LINES - All Students - Chronological: Generates a list of Evaluation / Re-Evaluation dates for all students. Other information displayed includes Status, Primary Codes and LRE. Students are listed in chronological order, with the earliest Evaluation Date appearing first.
- ELIGIBILITY TIME LINES - Select a Date - Alpha: User will be prompted to enter a date range. Generates a list of Evaluation / Re-Evaluation dates for all students within the specified date range. Other information displayed includes Status, Primary Codes and LRE Codes. Students are listed in alphabetical order.
- ELIGIBILITY TIME LINES - Select a Date - Chronological: User will be prompted to enter a date range. Generates a list of Evaluation / Re-Evaluation dates for all students within the specified date range. Other information displayed includes Status, Primary Codes and LRE Codes. Students are listed in chronological order, with the earliest Evaluation Date appearing first.
- Evaluation by Month and Year - Monthly - Alpha: On the Report Desktop menu, verify the school year is correct and select a month. The current month is chosen by default, but any month may be chosen. Click the Monthly – Alpha button to generate a list of all Re-Evaluations due during the selected month. Other information displayed includes Status, Primary Codes and LRE Codes. Students are listed in alphabetical order.
- Evaluation by Month and Year - Monthly - Chronological: On the Report Desktop menu, verify the school year is correct and select a month. The current month is chosen by default, but any month may be chosen. Click the Monthly – Chronological button to generate a list of all Re-Evaluations due during the selected month. Other information displayed includes Status, Primary Codes and LRE Codes. Students are listed in chronological order, with the earliest Re-Evaluation Date appearing first.
- OverDue Evaluation - Select a Date - Alpha: User will be prompted to use the drop-down arrow to select a date. Generates a list of all students whose Evaluations will be overdue on or before the selected date. Other information displayed includes Status, Primary Codes and LRE Codes. Students are listed in alphabetical order.
- OverDue Evaluation - Select a Date - Chronological: User will be prompted to use the drop-down arrow to select a date. Generates a list of all students whose Evaluations will be overdue on or before the selected date. Other information displayed includes Status, Primary Codes and LRE Codes. Students are listed in chronological order, with the earliest Re-Evaluation Date appearing first.

Error Reports

- No Primary Teacher: Generates a list of students who have not been assigned to a Primary Teacher. Other information displayed includes Disability Codes, School Number, LRE Codes, IEP Ending Date and Current Eligibility Date. Students are listed in alphabetical order and grouped by school, if there is more than one school in the district.

- Student with No School Assigned or Invalid: Generates a list of students who have no school assigned to them. Other information displayed includes Disability Codes, School Number, LRE Codes, IEP Ending Date and Current Eligibility Date. Students are listed in alphabetical order.

Historical Reports

- Historical Related Service: This report utility is used to generate a report of related services as drawn from Version 5.2 and lower (as of 7/7/03) and Version 6.1 and lower (as of 6/1/04). Report parameters should be set in the *Report Desktop for Related Services* filter.

> Note: By default, the majority of the *Historical Related Service* report parameters will be set to include all possible students in the report; these parameters may be altered to restrict the report to a certain group of students, as desired.

Child Count Utilities

Child Count Desktop

To access the *Child Count Desktop* menu, click the icon in the STISets desktop.
The *December 1 Date*, which refers to the December 1 *Child Count* Date as entered in *Preferences & Defaults* in *System Files* in the *Utilities Desktop* menu, is displayed in the upper-left corner. Statistical information about the most recent Child Count procedure is displayed on the right side of the *Child Count Desktop* menu.
Under *Counts*, *All* indicates the total number of Special Education students in the system. *Active* refers to the number of these students who have *Active* statuses in Child Count. "*Errors*" show the number of student records that have Child Count errors, and % Errors displays the percentage of total student records with Child Count errors.
To print or preview a log (indicating the *Creation Date* and the *User* who ran the procedure, as well as error percentage counts) of all Child Count Creation procedures that have been run, click the (*Print Child Count Creation Log*) icon, located on the right side of the *Child Count Desktop* menu.
The following sections describe the generation of Child Count in STISets, as well as the Error Checking procedure.

Users are advised to look through the most current *Release Notes* for STISets to check for any new information about the Child Count procedure. Occasionally, the release notes may refer the user to the STI Website for more details.

Generating December 1 Child Count

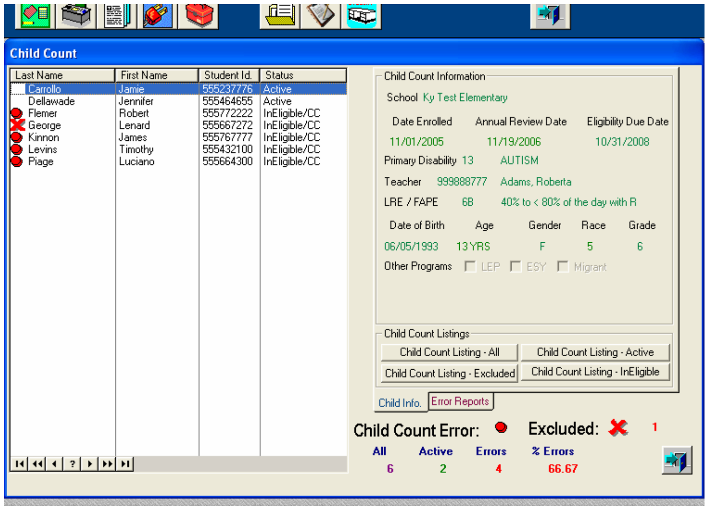
While the actual Child Count date will always be *December 1*, an up-to-date Child Count may be generated at any time during the school year. This procedure is useful for catching and correcting errors in Child Count before December 1. Perform the following steps to generate a Child Count:

- Click the Utility Desktop icon and select **System Files**.
- Click **Change** to the right of *Preferences and Defaults*, near the bottom of the *System Files* menu. Verify that the *December 1 Child Count Date* is correct. This date should equal 12/01/#### where #### is the current year.
- Exit the *System Files* menu and the *Utilities Desktop*.
- Click the **Child Count Desktop** icon.
- Click the **Create Child Count** button.
- The *Child Count Verify* window will appear. *Race Code 6* should match the race of the majority of students enrolled in Special Education. Click **Create Child Count**.
- After the Child Count procedure has completed, the user will be returned to the *Child Count Desktop* menu. Error statistics will be displayed at the top of the menu.

Child Count Error Reports

To investigate errors in the Child Count procedure, perform the following steps to generate error reports:

- Click the **Child Count Maintenance** button on the *Child Count Desktop* menu. The browse box on the left side of the screen will display a list of all students who have been assigned Special Education Folders. Each student whose record contains an error will be marked with a red button.



- Scroll down and click to select any particular student, and the demographic information on the right, which is the *Child Info.* tab by default, will change accordingly. Child Count error statistics are displayed at the bottom right side of the menu, identical to the *Error Counts* as shown in the *Child Count Desktop* menu.
- Use the error reports – which are described below – to locate and correct errors in student records.
- After errors have been corrected, Child Count must be generated again to reflect corrections.

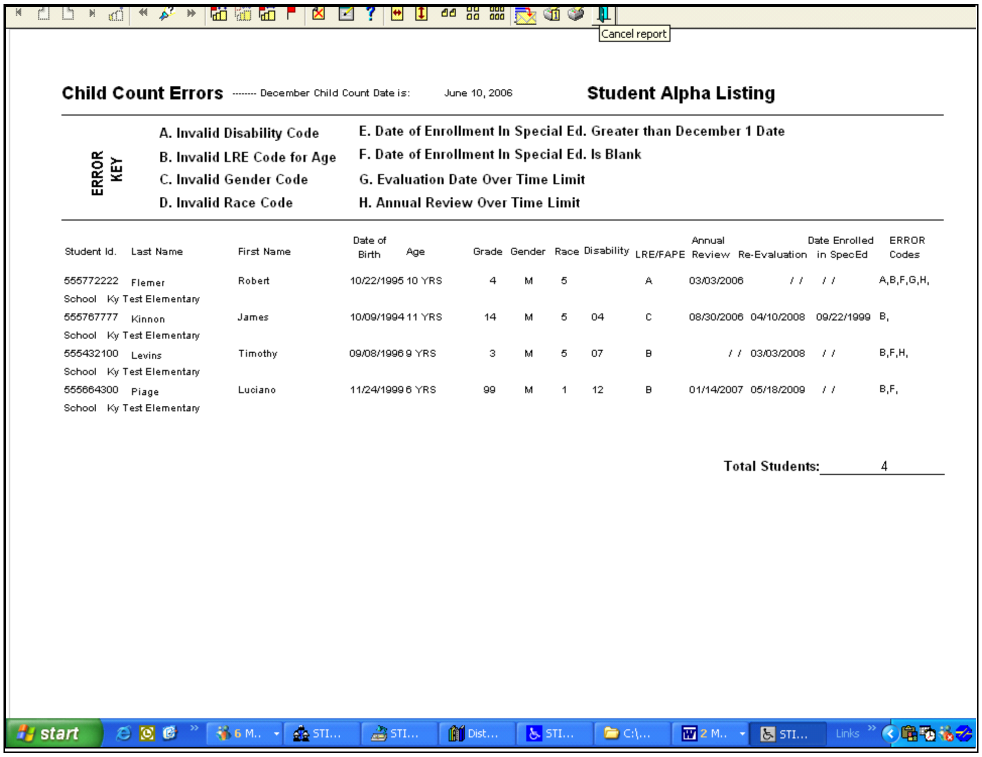
> <u>Note</u>: The *Child Count Error Reports* feature is used for viewing or printing Child Count information only. Any corrections made to remedy errors must be made from within each student's Special Education Folder, with the exception of errors in the *Grade*, *Social Security Number*, *Date of Birth*, *Race* or *Gender* fields. These errors must be corrected within STIOffice.

A variety of *Child Count Error Reports* are available. Following are brief descriptions of the various Child Count Error Reports:

Child Info

- <u>Child Count Listing-All</u>: This option will generate a list of Special Education students in alphabetical order, with the Child Count status of each student listed to the right (*Active* or *Ineligible/CC*).
- <u>Child Count Listing-Active</u>: This option will generate an alphabetical list of only those Special Education students who are *Active* for Child Count.
- <u>Child Count Listing-*Ineligible/CC*</u>: This option will generate an alphabetical list of only those Special Education students who are *Ineligible* for Child Count.
- <u>Child Count Listing – Excluded </u>This option will generate an alphabetical list of only those Special Education students who are excluded from Child Count.

Error Reports



- **All Errors**
  - Alpha by School: Generates a report with all Child Count Errors listed for each child. Students are listed in alphabetical order. Also included are details on Disability Codes, LRE/FAPE, Annual Review Date, Re-Evaluation Date and Date Enrolled in Special Ed.
  - Class Roster: Generates a class roster report with all Child Count Errors listed for each child. Students are grouped *by teacher* and listed in alphabetical order. Also included are details on Disability Codes, LRE/FAPE, Annual Review Date, Re-Evaluation Date and Date Enrolled in Special Ed.
  - By School: Generates a report with all Child Count Errors listed for each child. Students are grouped *by school* and listed in alphabetical order. Also included are details on Disability Codes, LRE/FAPE, Annual Review Date, Re-Evaluation Date and Date Enrolled in Special Ed.
- **Compliance Reports**
  - Compliance Total Errors: Generates a summary report of all Child Count Errors, broken into categories and percentages.
- **Field Errors**
  - Exceptionality: Generates a report that lists students with invalid Primary Disability Codes. Other information included here: LRE/FAPE Codes, Date Enrolled, Annual Review Date and Re-Eval Date.
  - LRE/FAPE: Generates a report that lists students with invalid LRE/FAPE Codes for their ages. Other information included here: Date Enrolled, Annual Review Date, Re-Eval Date and Primary Codes.
  - Gender: Generates a report that lists students with invalid Gender Codes. Other information included here: LRE/FAPE Codes, Date Enrolled, Annual Review Date, Re-Eval Date and Primary Codes.
  - Race: Generates a report that lists students with invalid Race Codes. Other information included here: LRE/FAPE Codes, Date Enrolled, Annual Review Date, Re-Eval Date and Primary Codes.

- Enrollment Date: Generates a report that lists students with Child Count Errors in their Enrollment Dates (the date is either blank or greater than December 1 Date). Other information included here: LRE/FAPE Codes, Annual Review Date, Re-Eval Date and Primary Codes.
- Evaluation Time Line: Generates a report which lists students whose Evaluation Dates are over the time limit. Other information included here: LRE/FAPE Codes, Date Enrolled, Annual Review Date, and Primary Codes.
- Annual Review: Generates a report that lists students who's Annual Review Dates are over the time limit. Other information included here: LRE/FAPE Codes, Date Enrolled, Re-Eval Date and Primary Codes.

Utility Desktop

The **Utility Desktop** feature is of special importance to the STISets System Administrator.

The following procedures should be performed in **Utility Desktop** to get STISets ready for general use.

To open **Utility Desktop**, click the  icon.

System Files

System Files contain important information about the school using STISets.

To access the System Files, click the **System Files** button under *School / Employee Information* in the *Utilities Desktop* menu. Follow the steps below to make sure the System Files are set up correctly for the program:

- Main System File: Click the **Change** button to the right of the *Main System File* box to verify that this information is correct. It is particularly important that the *School Number* be accurate.

  > Note: If STISets was installed with the *STIOffice* option (as opposed to the *Non STIOffice* option), *Main System File* information will be automatically copied from the STIOffice System File when STISets is first opened.

- SETS System File: Click the **Change** button to the right of the *SETS System File* field at the top of the screen. The displayed information should match the information in the *Main System File*. If there is nothing listed, or if the information shown is incorrect, do the following:
  - Click **Cancel** to exit the *SETS System File* menu. Then click the **Change** button to the right of the *Main System File* box in the middle of the screen.
  - When the *Main System File* menu appears, click **OK**.
  - Exit the *System Files* menu and then exit the **Utilities Desktop** menu.
  - Reopen **Utilities Desktop** and select **System Files**. The *STISets System File* should now match the *Main System File*.
  - **System Defaults** – *UPDATE STUDENT FILE (GRADE SKIP)*: Enter any grade that should be omitted from the *System Maintenance* procedure. This option is typically used when loading feeder school(s) for pre-registration. Leave the field blank (or clear it after it has served its purpose) to include all grades when *System Maintenance* is run in the future.
- Preferences and Defaults: Click **Change** next to *Preferences and Defaults* to verify the *December 1 Child Count Date* has been set for the current year.

  > Note: STI does not recommend that the Child Count Date be changed except to report child count. Current errors can be printed from the Report Desktop.

- Error Checking on for Dates: Select this box to enable automated verification of *Evaluation* and *Annual Review* dates on the designated *Child Count* date. See note onscreen for more details.
- Inactivity Time Out: The system administrator can set this to log off a user after a set time has elapsed. This does not automatically save data. The user must click the **OK** button to save the form before leaving the software unattended. This can be a safety precaution in case a user has to move away from the computer for a period. If so, the software will log out and possibly prevent unauthorized access. There is no limit to the amount of time that can be set. Setting the time out value to *0* will result in no time out whatsoever. The time out takes effect the next time the user logs in after setting the time out.

Manage Data Path

Manage Data Path (available only for users with administrative access rights) provides the user with the ability to open multiple schools from one workstation. To add/edit data paths, follow the directions below.

- Select **Utility Desktop**.
- Click on **System Files**.
- Click on **Manage Data Path**.
- Click on **Insert** and select or type the *School Name*, *Data Path*, *Pic Path*, and *Hts path*.
- If you want the datapath window to appear at start up, check the *Show this window at start up* box.

School(s) / Location(s)

Select this option in the *Utilities Desktop* menu to add, modify, delete or view information about any school involved in the Special Education process.

- Click **Insert** to add schools to the list. All the schools for a district and other schools which they use (for whatever reason) in STISets should be entered. All schools belonging to the district should be labeled "our school".

Reports

Use the drop-down arrow in the middle of the menu to select one of the following types of school reports:

- Simple School Listing
- Detail School Listing
- Listing of Employees by School

Employees: Creating and Maintaining the List

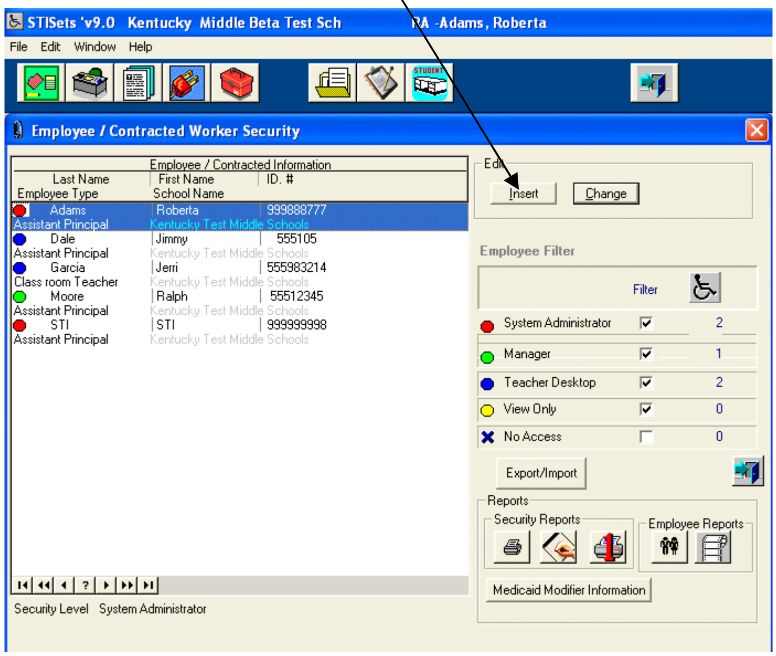
To create, view or maintain individual employee information in STISets, do the following:

- In the *Utilities Desktop* menu, click **Employee Types**. A number of general employee categories come preinstalled with STISets. If any additional categories need to be added, click **Insert** to enter a *Type* code and a *Type Description*. Click **OK** to save and the record will be added.
- In the *Utilities Desktop* menu, click the **Employees** button to enter teachers and other employees involved in Special Education. The list of employees is displayed in the *Employee/Contracted Worker Security* menu's browse box.

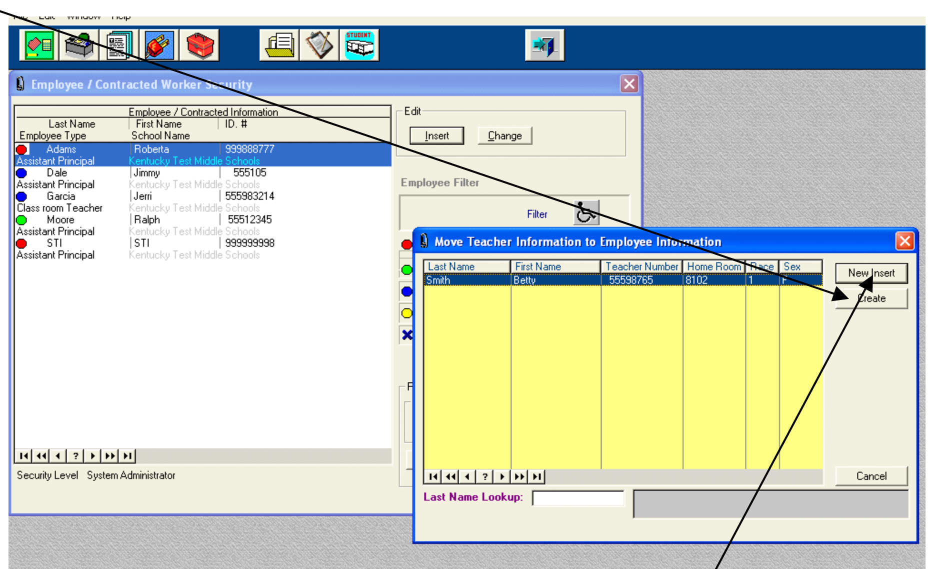
> Note: Any pre-installed employee types, such as *STI* or *Export Data*, are included for utility/support purposes and should not be modified or deleted.

Adding Employees

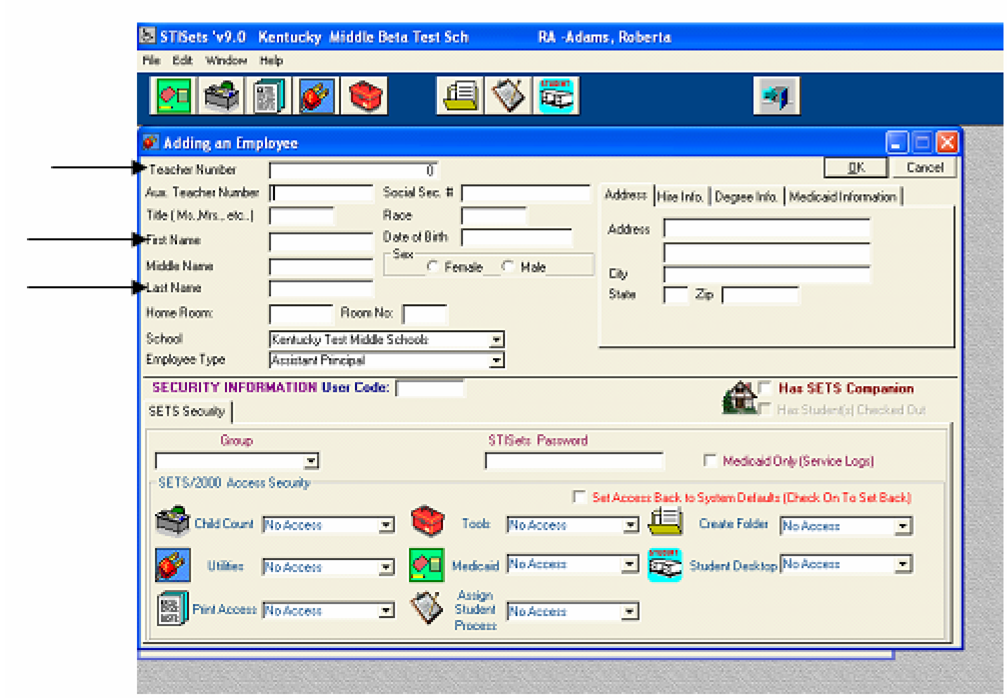
To add an employee record to the STISets database, click **Insert** in the upper right corner of the *Employee / Contracted Worker Security* menu. Two different scenarios may occur here:



- If there are any employees in the STIOffice database who have not been added to the Special Education employee list, the *Move Teacher Information to Employee Information* menu will appear, containing the names of these teachers in the browse box. Select a teacher from the list and click **Create** to add that teacher to the STISets Employee record.



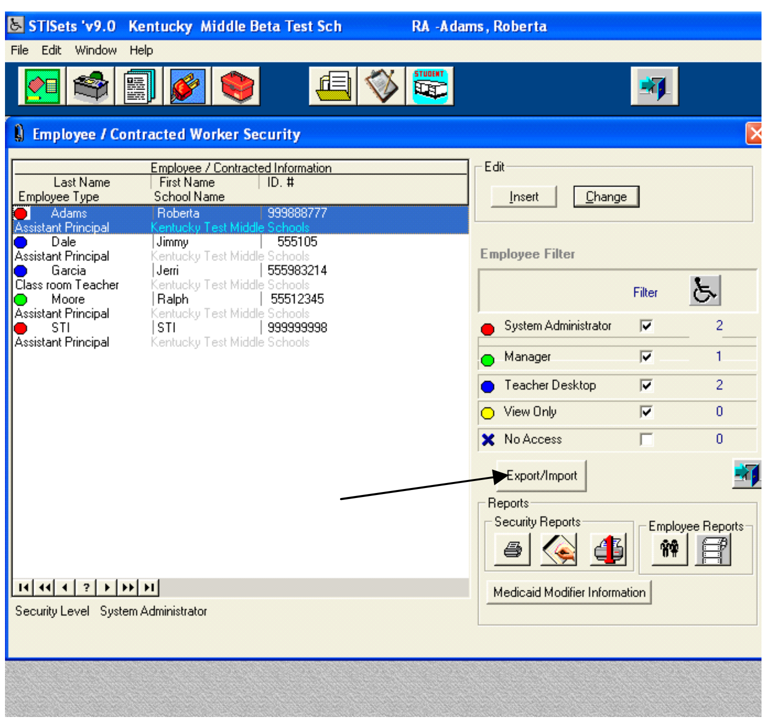
- It is also possible to enter a new employee record from scratch by clicking the **New Insert** button; however, if this is done, the employee record may exist only in the STISets database and not in STIOffice.



Note: Three fields are required for creating an employee record: *Teacher Number*, *First Name* and *Last Name*.

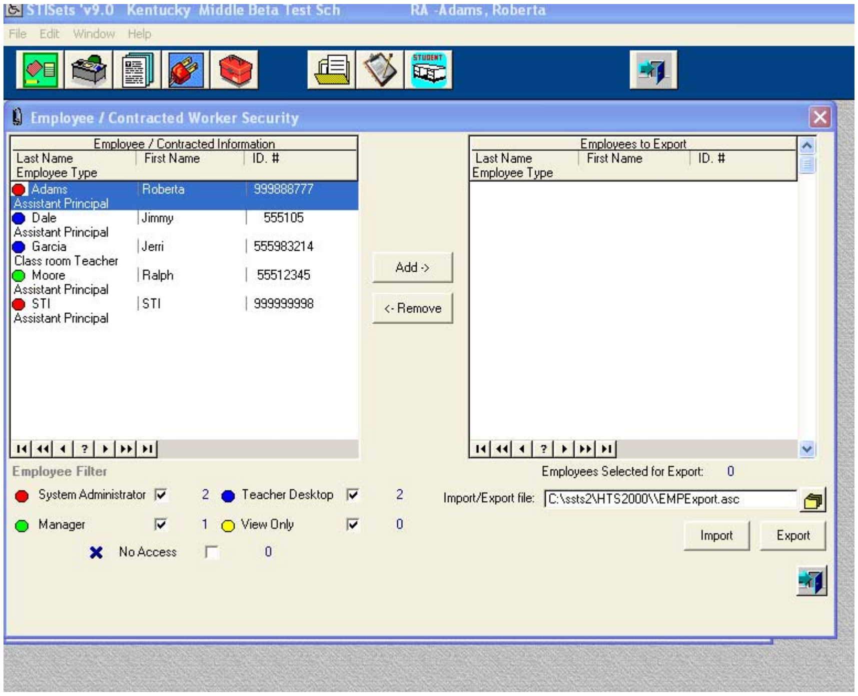
Importing or Exporting an Employee

This gives the user the ability to import or export an employee from one school to another school. This prevents you from having to manually create an employee record for personnel who provide services at multiple schools.



To export an employee record, follow these steps:

- Open the *Employee* screen.
- Click the **Export/Import** button.
- Select the employee or employees you want to export using the **Add** or **Remove** buttons.
- Use the ellipsis to locate where you want to export the file.
- Click **Export**.
- The file name is "EMPExport.asc".



To import an employee record, follow these steps:

- Locate the "EMPExport.asc" file.
- Double-click the file.
- Highlight the desired employee.
- Click **Import** to add this employee record.

Entering / Modifying Employee Information

To enter or modify a record for an employee who is already listed in the *Employee / Contracted Worker Security* browse box, either double-click that employee's name in the browse box or select the employee and click the **Change** button in the upper right corner of the screen. After changes have been made, click **OK** to save.

A Note on User Access

Within each record, any employee who will use STISets must be assigned a two- or three-letter *User Code* (typically that employee's initials; a number may be added when more than one employee has the same initials); a *User Group*; and an STISets *Password*. Passwords may be up to eight characters in length and may be chosen by teachers (then submitted to the STISets Administrator for entry) or they may be assigned directly by the administrator.

See the description below for security access defaults. If a user has been assigned *Student Desktop* access rights with additional rights (e.g., a Speech Pathologist with access to the *Create Folder Desktop* utility), only a System Administrator or other user with full access rights to the *Utility Desktop* may edit the current security access. A manager may NOT edit rights for the *Teacher Desktop*, with the exception of *Student Desktop* and *Print Access*.

The following *User Groups* are available:

- <u>System Administrator</u>: By default, a system administrator has full access rights to all desktops and can edit ALL users' security access rights:
    - Child Count = Full Access
    - Utilities = Full Access
    - Print Access = Full Access
    - Tools = Full Access
    - Medicaid = Full Access
    - Assign Student Process = Full Access
    - Create Folder = Full Access
    - Student Desktop = Full Access
- <u>Manager</u>: By default, a manager has NO access to the *Utility Desktop*, but the System Administrator may opt to give the manager *Employees Only* access, which will allow the manager to insert and maintain security for the program.
    - Child Count = Full Access
    - Utilities = No Access (*Employees Only* rights may be assigned to allow a manager to maintain employee info)
    - Print Access = Full Access
    - Tools = Full Access
    - Medicaid = Full Access
    - Assign Student Process = Full Access
    - Create Folder = Full Access
    - Student Desktop = Full Access

<u>Rules regarding a manager's ability to edit security information</u>: A manager may create or insert a new employee, but may NOT assign security rights that are higher than *Teacher Desktop* level.

A manager may only assign *Group* rights in the following areas: *Teacher Desktop*, *View Only* or *No Access*.

A manager may not edit the rights of another manager or a system administrator.

The only DESKTOP access rights a manager may edit are *Student Desktop* and *Print Access*.

If a system administrator assigns a user *Student Desktop* access with additional rights to other desktops (e.g., a Speech Pathologist with access to the *Create Folder Desktop*), only a system administrator or other user with full access to *Utilities Desktop* may remove *Create Folder* access previously assigned to that user.

- Teacher Desktop: This group should be assigned exclusively to Special Education teachers/service providers. Default rights include *Student Desktop* and *Print Access*.
    - Child Count = No Access
    - Utilities = No Access
    - Print Access = Full Access
    - Tools = No Access
    - Medicaid = No Access
    - Assign Student Process = No Access
    - Create Folder = No Access
    - Student Desktop = Full Access

    > Note: Members of the *Teacher Desktop* group will have access only to students assigned to them in their capacities as *Case Managers* or *Service Providers*. No other students will appear on their desktops – UNLESS specifically assigned by a user with access to the *Employee/Student Assignment* screen.

    - When the *Teacher Desktop* group is assigned to a user, a *Sub Group* must be selected. The *Sub Group* field will appear to the right of the *Group* field. Use the drop-down arrow to assign one of the following *Sub Groups*:
        1. No Access: The user will not be allowed to log in to the program.
        2. Full Access: The user will have full access to all desktops defined within his/her record, with the ability to edit information in the student record.
        3. View Only: The user will have read-only access to all desktops defined within his/her record. However, no information may be edited or printed.
- View Only: Users in this group have no rights to modify data, but may view it. Examples of persons who might be assigned to this group include the principal or a regular classroom teacher who may need to see a student's Special Education record, but should not have the rights to change it.
    - Child Count = No Access
    - Utilities = No Access
    - Print Access = No Access
    - Tools = No Access
    - Medicaid = No Access
    - Assign Student Process = No Access
    - Create Folder = No Access
    - Student Desktop = Full Access
- No Access: Users assigned to this group will have no access to the program.
    - Child Count = No Access
    - Utilities = No Access
    - Print Access = No Access
    - Tools = No Access
    - Medicaid = No Access
    - Assign Student Process = No Access

- Create Folder = No Access
- Student Desktop = No Access

Desktop Rights

- System Administrator: Has unrestricted rights to all areas for all students.
- Case Manager: Has unrestricted rights to all students on his/her folder caseload.

The respective access rights described above are assigned to members of each user group by default. However, the System Administrator may define each individual user's access rights to any degree desired.

Customizing User Access Rights

To customize access rights for a user:

- Open the user's record in the in the *Employee / Contracted Worker* menu.
- Click the drop-down arrow next to any *Access Security* field at the bottom of the record to give *Full Access* or *No Access* to the field in question.
- At any time, the user's access rights may be returned to the regular system defaults by clicking the *Set Access Rights Back to System Defaults* box above the *Access Security* fields.

Medicaid Information

Information should be entered here for employees who are Medicaid eligible.

- Modifier: Select the modifier from the drop-down menu.
- Modifier Assigned Code: Enter the sequential number assigned by the district. This number must be unique for each teacher.
- Eligible to bill Medicaid: Check this box to indicate that the employee can create service logs.

Viewing Employee / Contracted Worker Records

After multiple employee records have been created, the user may need to browse the list for specific types of employees. For this purpose, there are five view filters, corresponding to the five *User Groups*. These filters are located to the right of the list of employees in the *Employee / Contracted Worker Security* menu.

- Uncheck a filter (*System Administrator, Manager*, etc.) to remove from view all employees who belong to the group in the filter.
- **Only filter groups with check marks will be displayed**. The data contained in the records is not deleted or modified in any way, nor is it relocated. This option only affects the current onscreen display.
- The total number of users belonging to a filter group will be displayed to the right of each checked filter. Colored symbols are displayed next to employees' names in the browse box to denote which employees belong to a particular filter group.

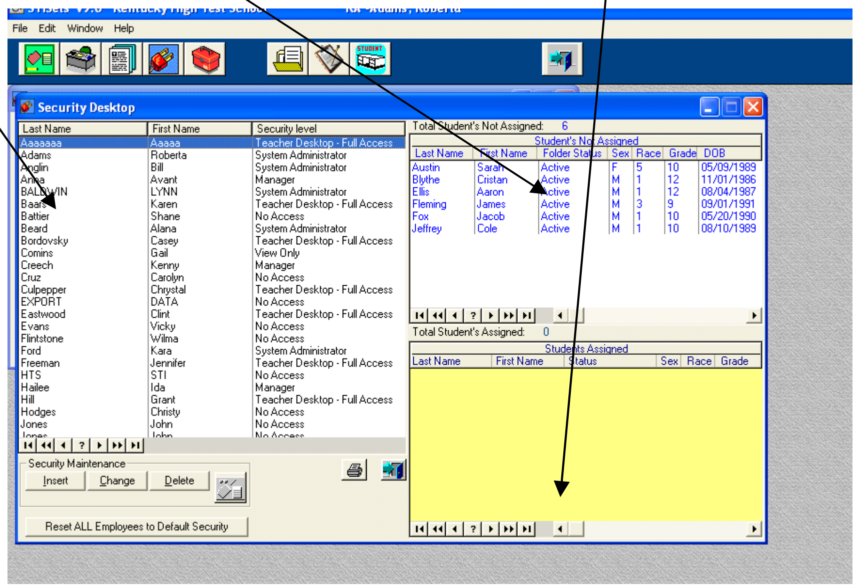
Employee Reports

The icons below the *Employee / Contracted Worker Security Information* browse box can be used to generate a variety of reports to help manage the employee list and control system security.

Employee Student Assignment

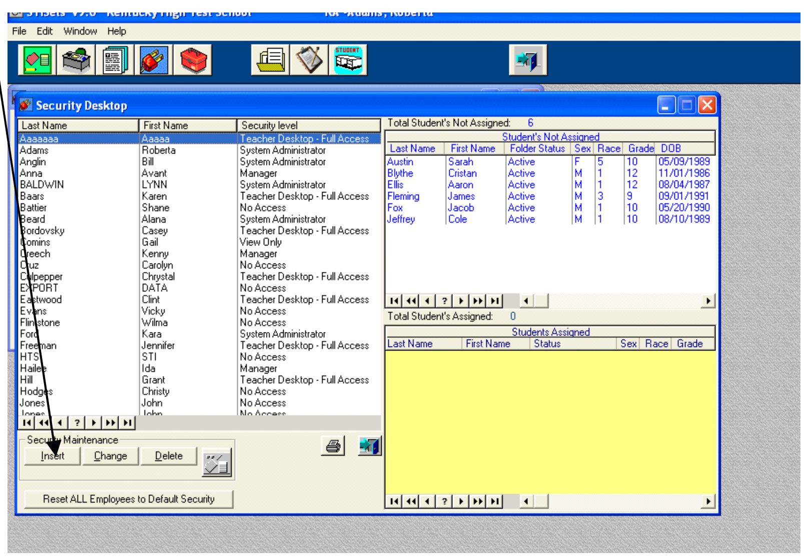
Employee Student Assignment allows the user to assign student(s) to a specific service provider. Access to the Student Desktop, Folder and Forms can be assigned entirely or in part. If a student needs additional information for a reevaluation, access can be granted to another user/service provider in order for the form to be completed.

Click on the **Employee Student Assignment** button. *The Security Desktop* window will appear, divided into three sections: (Left) Employees; (top-right) Students Not Assigned; (bottom-left) Students Assigned.

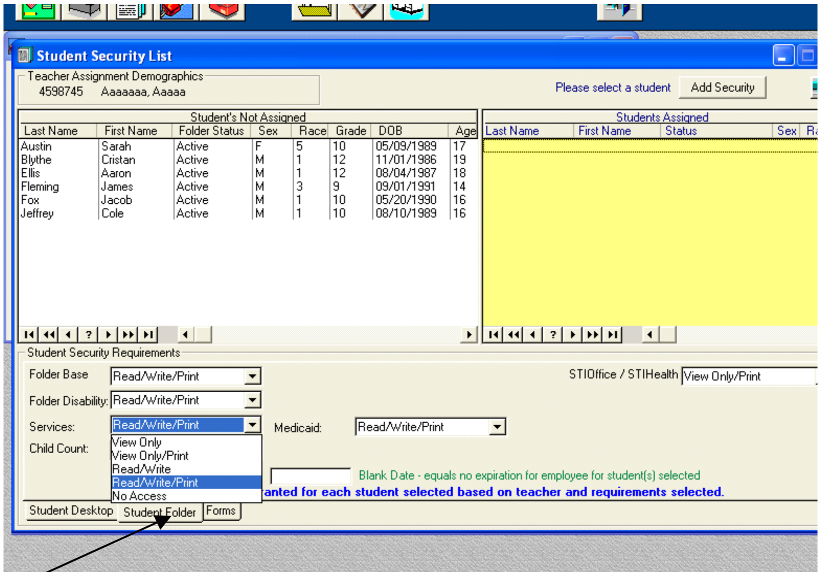


Assigning / Inserting Students to Employees

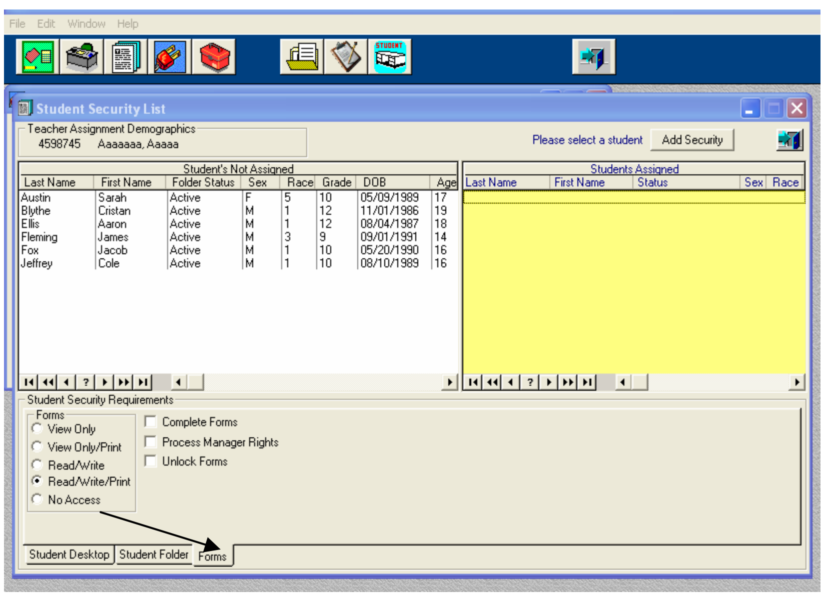
- Select/highlight an employee (left side). The employee's name will appear at the top-left corner of each window in the process.
- Click on the **Insert** button at the bottom left.



- In the *Student Security List* window, select a tab at the bottom of the screen to assign rights to the appropriate area (**Student Desktop | Student Folder | Forms**).
- Student Desktop Tab - Access/No Access Rights may be granted to the following items: Folder, Forms, STI Office, STI Health, Reports, Archive Forms and Companion. The *Set All* drop-down list allows the user to set all rights to either *Access* or *No Access* without having to click on each area.



- Student Folder Tab - View Only; View Only/Print; Read/Write; Read/Write/Print; No Access can be granted to the following items: Folder Base, Folder Disability, Services, Child Count, Medicaid, STIOffice/Health. If no *General Expire Date* is entered, the user will have access to these items for an indefinite span of time.



- Forms Tab - View Only; View Only/Print; Read/Write; Read/Write/Print, and No Access can be granted to forms. You may also elect to give the user rights to *Complete Form, Process Manager Rights, and/*or U*nlock Forms*.

- When the desired rights have been selected, click on the **Add Security** button located at the top-right corner and the student(s)' name(s) will appear in the right side of the window, indicating that rights have been assigned.

Changing Employee / Student Access Rights

- To change access rights, highlight the appropriate service provider's name and click the **Change** button.
- Highlight the student whose access rights are to be changed.
- Select the appropriate tab (*Student Desktop*/*Folder*/*Forms*).
- Use the radio buttons to make the desired changes.
- Click the **Update Security** button to save the changes.

Note: Changing the Case Manager (on any window in the folder) removes security rights from that user; the receiving case manager's security will be based on access rights assigned in the Employee File.

Deleting a Student from the Desktop

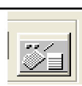
When access rights for a specific student have been assigned to a user, that student's name will appear on the user's desktop. The student's name will stay on the desktop until deleted.

The only instance in which a student needs to be deleted from a desktop is if the user is no longer a case manager, special ed. service provider or related service provider.

Follow the directions below to delete a student from a user's desktop:

- Highlight the appropriate teacher/service provider and click the **Delete** button.
- Highlight the student(s) to be deleted.
- Click the **Update Security** button to save the changes.

If a student is mistakenly deleted, he/she can be reassigned to the service provider by following directions above.

Note:  The **Reset** button to the right of the delete feature will reset the selected teacher to default in Employee Files. To set all employees to the default settings, click on the button "Reset ALL Employees to Default Security"

Deleting Employees

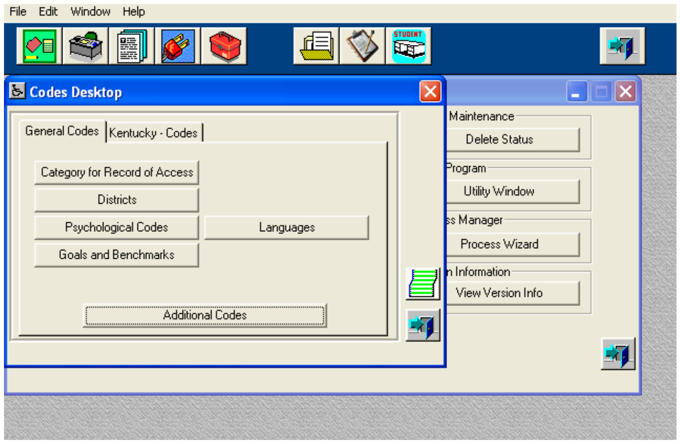
In the *Utilities Desktop* menu, select **Delete Employees** to delete employee or contracted worker records from the STISets *Employee File*.

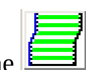
Two types of employees cannot be deleted: Those with *System Administrator* rights and those with *Special Education / Health Folders* attached to them.

Highlight any employee to be deleted and click the **Delete** button. A second *Delete Employee* screen will appear as a precaution. Click **Delete Record** to proceed or click **Cancel** to abort the procedure.

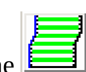
Code Desktop

Select **Code Desktop** in the *Utilities Desktop* menu to enter, view or modify codes used in STISets. The *Codes Desktop* menu will appear.



- Codes and their descriptions may be printed or viewed in report form by clicking the  icon (*Code Report Desktop*) in the corner of the *Codes Desktop* menu. This is a read-only selection. Data is entered via **Code Desktop** and viewed or printed in **Code Report Desktop**.
- *Least Restrictive Environment (LRE) Exiting,*, and *Exceptionality* codes come pre-installed with information from the State Department. These codes may not be edited. Other codes, such as *Districts*, are drawn from the STIOffice database. Alterations to these codes should be made in STIOffice, not STISets.

> <u>A note to STISets Administrators about *LRE* and *Exceptionality* codes</u>: *LRE* and *Exceptionality* codes, as preinstalled in STISets, will override their counterparts in the STIOffice application.

- In STISets, *LRE*, Exiting, and *Exceptionality Codes* are located by clicking the  icon in the *Codes Desktop* menu. In STIOffice, *Special Education* codes are located by clicking **Utilities** in the main menu, then selecting **Code Maintenance** | **Most Codes** | *Student* | *Sp Ed*.

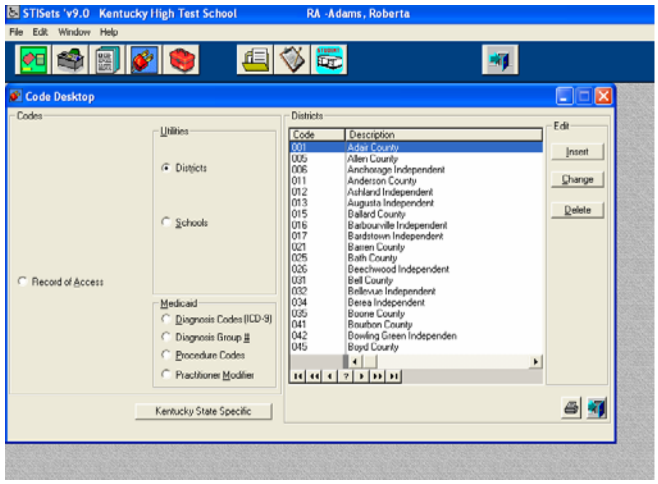
General Codes

Following are brief descriptions of the codes available in *Code Desktop*. A *(P)* next to the code name indicates the code is preinstalled.

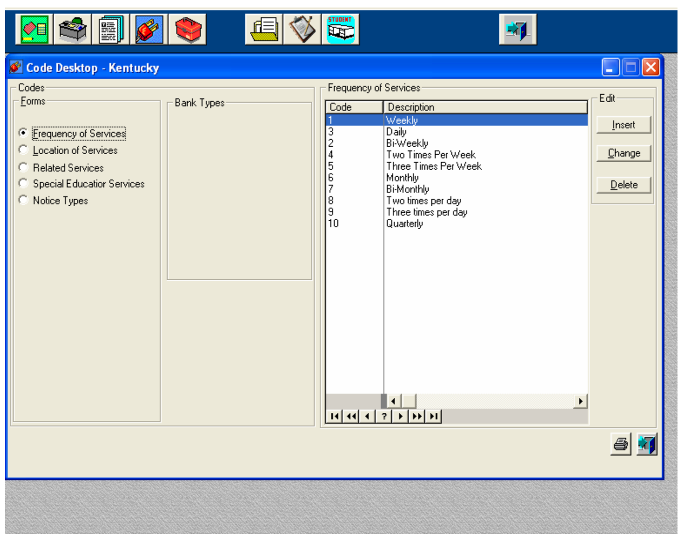
- <u>Category for Record of Access</u>: Use to describe types of users who access student records. Examples include *State Dept.*, *Parents*, etc.
- <u>Districts</u> (P): These codes are used for all school districts relevant to STISets.
- <u>Psychological Codes</u>: This field will be utilized in STISets at a later date.
- <u>Goals and Bench Marks</u> (P): The window on the left lists the *ID*, *Bank Code* and *Bank Area* for all *Annual Goals for Special Education* students. The window on the right lists the *ID*, *Auto ID* and *Data Bank* information for all *Benchmarks for Special Education* students. Select an *Annual Goal* on the left and the *Benchmark* on the right will change accordingly. Two small fields at the bottom of the menu display the full text of correlated *Goals* and *Benchmarks*. The ID numbers in both fields will match. Printer icons are located at the top of this menu.

Note: STISets comes pre-installed with a bank of goals and benchmarks, but the user has the ability to personalize this information. Items may be modified or deleted, and new items may be inserted.

- Languages (P): These codes are used to describe the primary language of the Special Education student.
- Additional Codes (P): Record of Access, along with Statewide *Districts* and *Schools* are displayed here. *Medicaid* codes are also shown here.

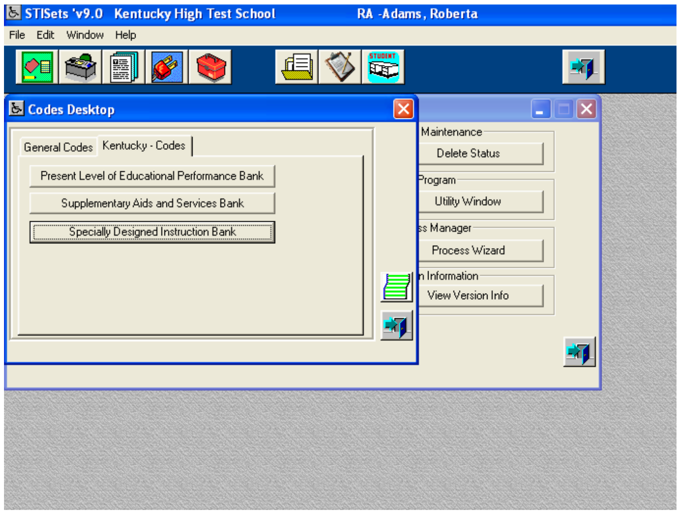


- Kentucky State Specific codes



- Frequency of Services: (P) Used to describe the timeframes for Related Services.
- Location of Services: (P) Used to describe the location that services will be provided from. With v9.0 STISets, these codes are locked and can not be modified.
- Related Services (P): Used to describe additional services or procedure for students.
- Special Education Services: Used to describe the Special Education Services.
- Notice Types: Used to describe the Notice Types from ARC meeting notices.

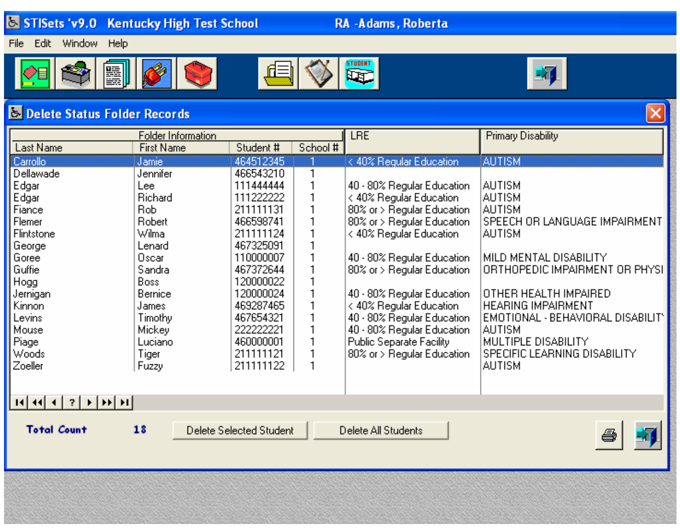
Kentucky - Codes tab



- Present Level of Educational PerformanceBank: Contains fields for *Bank Codes* and the corresponding *Performance Areas*. These codes are used to gauge students' academic or other type of performance in the IEP record.
- Supplementary Aids and Services Bank: This item contains supplementary aids and services records. These records may be created and maintained here.
- Specially Designed Instruction Bank: This item contains specially designed instruction records. These records may be created and maintained here.

Delete Status

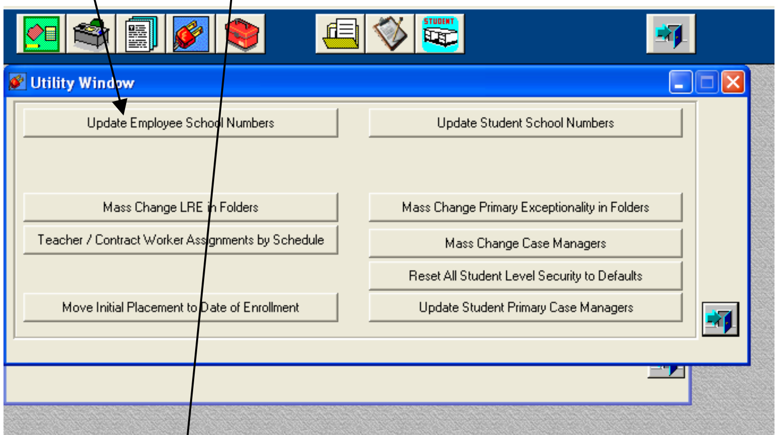
This feature allows the user to delete those students whose status has been set at "Delete" within the student folder. This screen will allow the user to delete individual students or delete all students who appear on this screen. This operation will delete the selected student(s) from the STISets program.

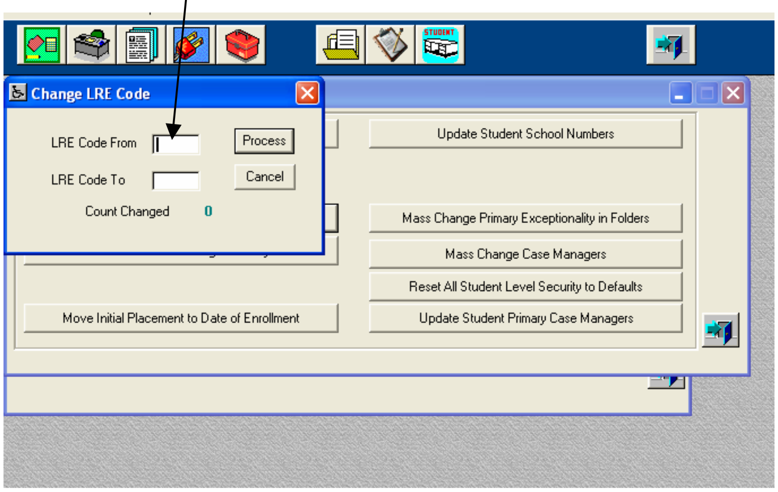


Utility Program

In the *Utilities Desktop* menu, click **Utility Window** to perform broad changes to various fields. The following options are available:

- Update Employee School Numbers: Use whenever employee school numbers have changed.
- Mass Change LRE in Folders: Enter *LRE* codes spanning a desired range of fields. Click **Process** to make the changes. This procedure would typically follow from a code change at the state level. Prior to doing this process, it might be helpful to print the LRE Codes from Code Desktop, Print Option, Least Restrictive Environment.





- Move Initial Placement to Date of Enrollment: Clicking this button will copy placement date information to the *Date of Enrollment* field. No information is displayed during this process, but a progress bar will flash while the procedure runs.
- Update Student School Numbers: School numbers will be updated in the student file. This procedure should correct the problem of students who appear in the *Special Education Folder* menu with no school names listed.
- Mass Change Primary Exceptionality in Folders: This option should be used if *Exceptionality* codes are changed at the state level. Enter *Exceptionality* codes spanning a desired range of fields and click **Process** to effect the changes.
- Mass Change Case Managers: Allows *Case Managers* to be changed in batch form, by replacing or assigning teachers to specific disability.

- Reset All Student Level Security to Default: PLEASE CONTACT STI SUPPORT BEFORE USING THIS FEATURE. Resets all teachers to default security settings.
- Update Student Primary Case Managers
- Teacher/Contract Worker Assignment by Schedule: This option allows users who utilize STIOffice Scheduling to assign teachers class rosters according to their schedule.

STIDistrict Sets – Medicaid

Overview

The **STIDistrict Sets** application enables the district-level user to draw Special Education data from all local schools into one database at the board office. This accumulated information may then be used to generate reports, on either a school-by-school basis or by all schools collectively.

Other features of STIDistrict Sets:

- The program will generate the state-required district Child Count file, as well as additional reports pertaining specifically to Child Count information.
- Local schools in the district may upload Special Education information to STIDistrict Sets as often as desired.
- Class rosters may be generated at the board office and sent to local schools for verification by Special Education teachers.
- Child Count errors may be identified at the board office throughout the year, and then corrected at each local school well in advance of December 1.

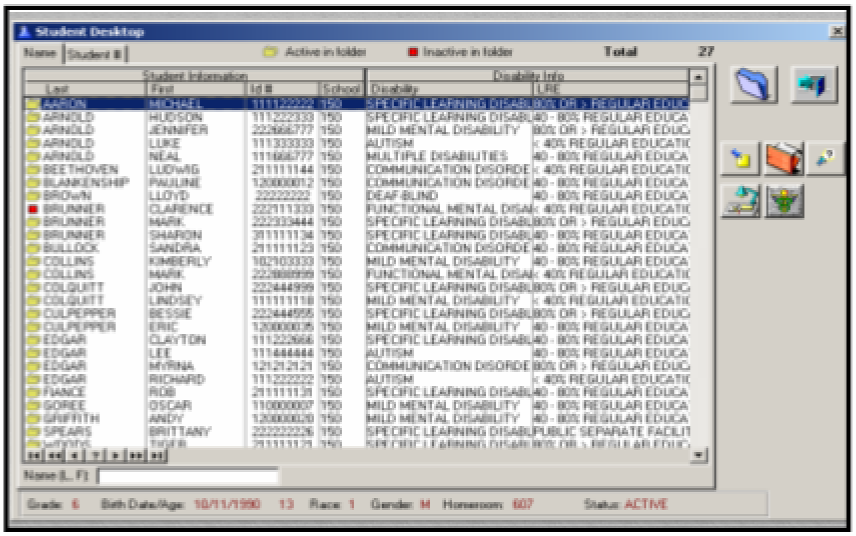
Student Desktop

Click the **Student Desktop** button to view demographic information, folder information, or forms on all Special Education students.

Users familiar with STISets will notice some differences in the appearance and functionality of Student Desktop in STIDistrict Sets. This is because STIDistrict Sets is used for *viewing* rather than *entering* data.

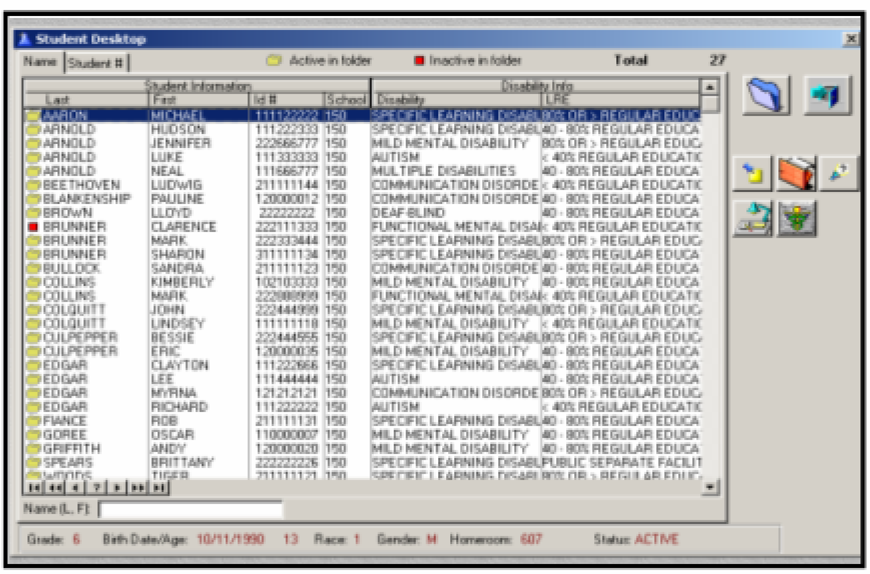
Viewing Student Folder

- Highlight the student in the browse box.
- Click the  button at the right of the browse box.



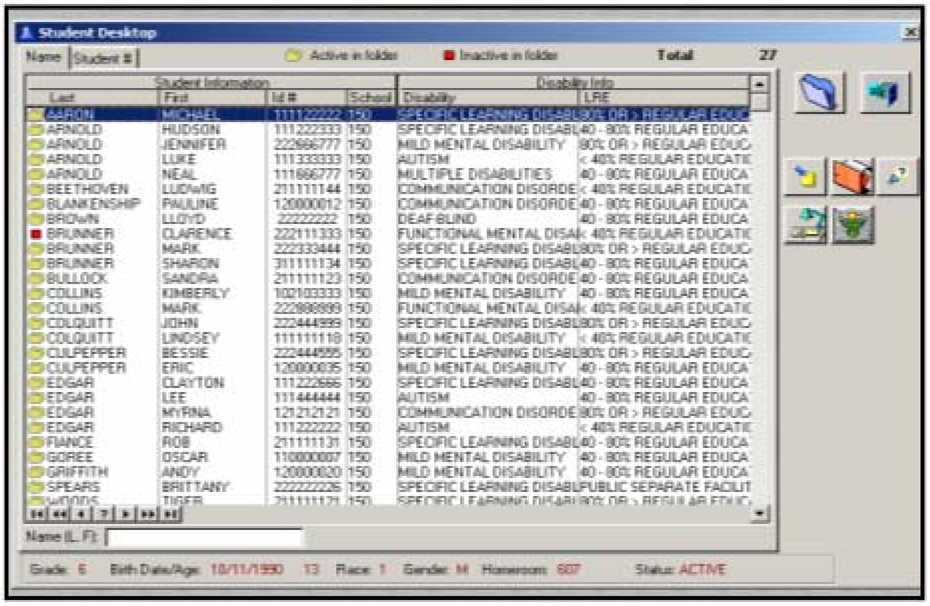
Viewing Non-Process Student Forms

- Highlight the desired student in the browse box.
- Click on the  button to the right of the browse box.
- Click the button for the desired form

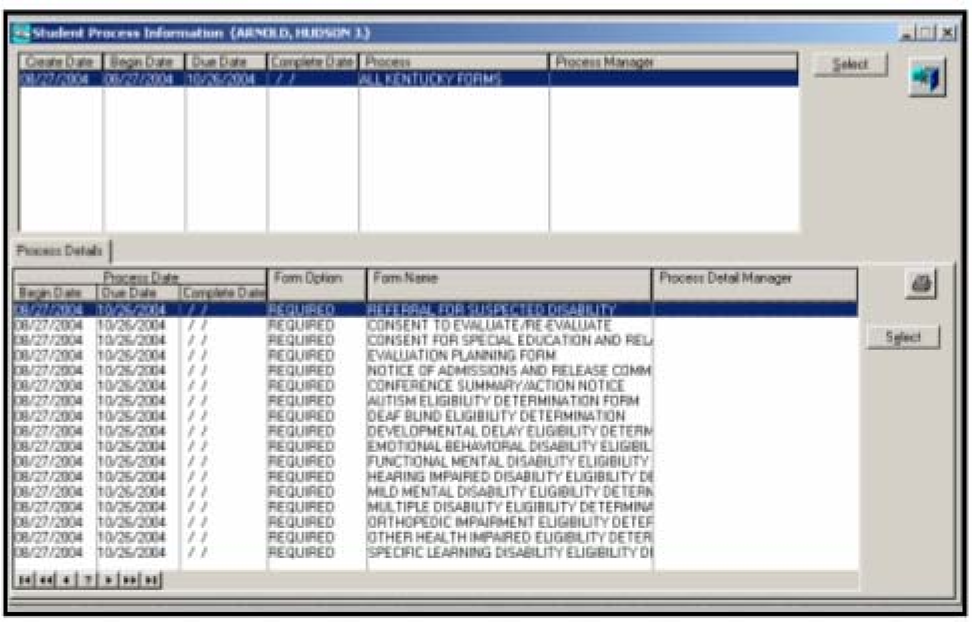


View Forms for a Student

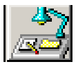
- Highlight the student in the browse box.
- Click on the  icon.

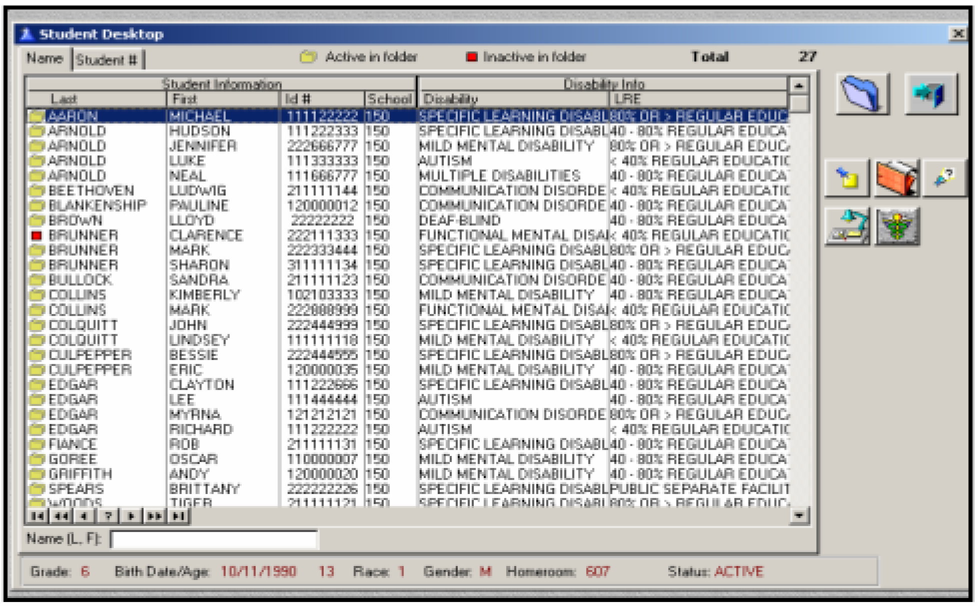


- Highlight the desired form and click the **Select** button.

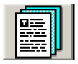


View Student(s) IEP

- Highlight the student in the browse box.
- Click the  button.
- Find and highlight the IEP, then click **Select**.
- View Student Data
- Highlight the student in the browse box.
- Click the  icon view STIOffice data.
- Click the  icon to view STIHealth data.

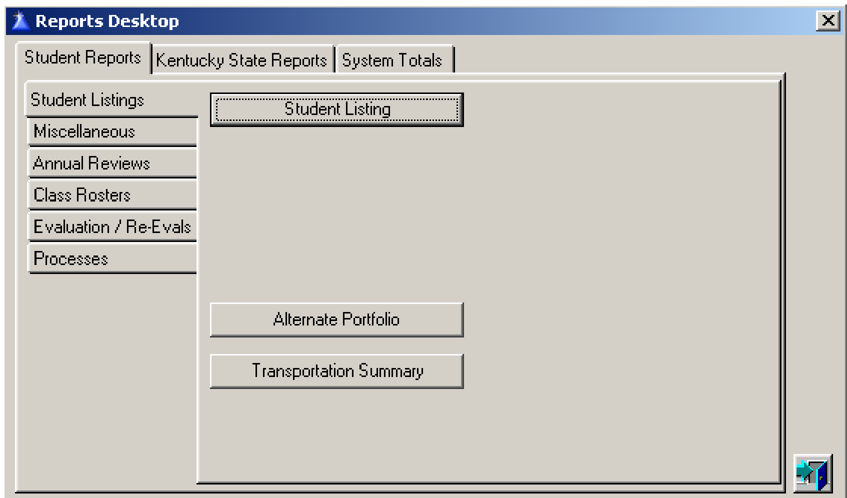


Reports

Click the  icon to generate several district-level reports. The user has the option to select and define report criteria.

Viewing Default Reports

- Click on the tab and then the button of the selected report.
- Click on the **Printer** button on the *Report Setup* window.



Using the Report Setup Feature

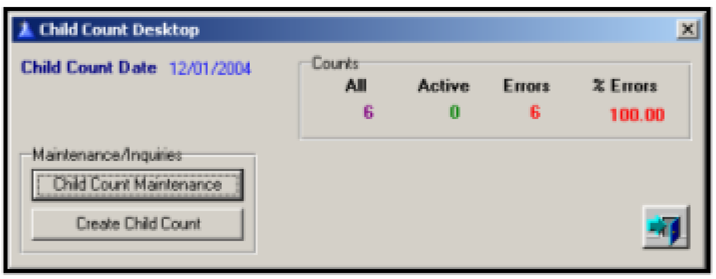
- Click the tab and then the button of desired report.
- Sort orders are available from the drop-down menu.
- Check the box next to *School* in the *Page Break* area to start a new page for each school.
- To generate reports for selected schools, click the **Schools** button and highlight the desired school(s).
- On certain reports, remove the check next to *Teacher* and then click in the drop-down box to select one teacher.
- After all selections have been made, click the **Printer** button.

Child Count

Click the  icon to create a district-level Child Count. Several reports may be generated here also. *Key Codes Error Reports* allow you to easily see where your Child Count errors are.

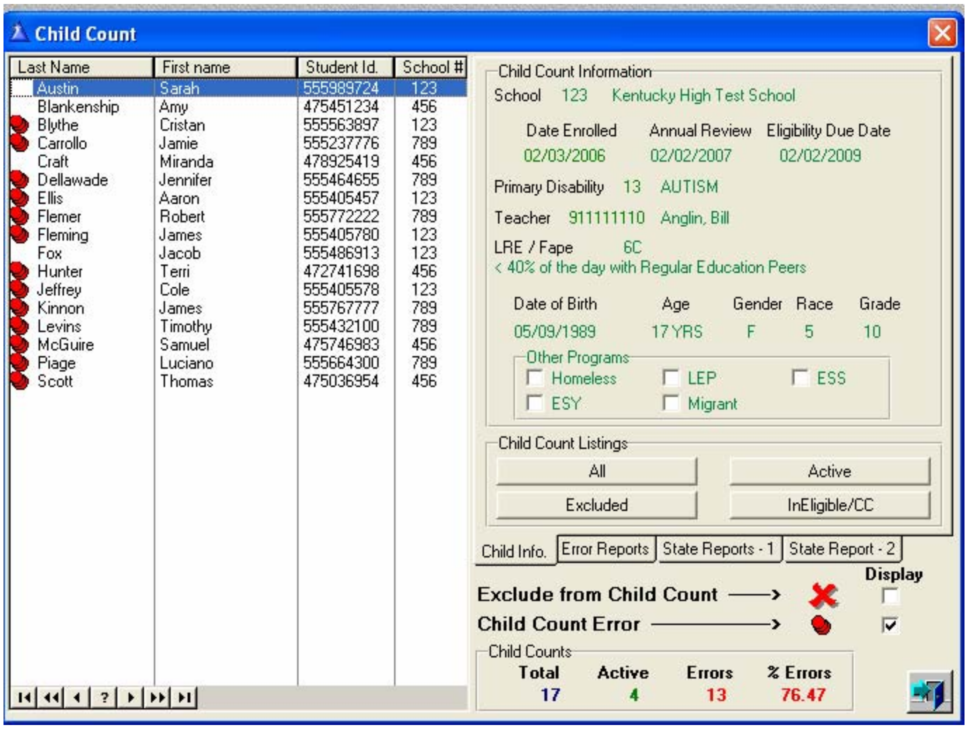
Creating Child Count

- Open the Child Count Desktop.
- Click the **Create Child Count** button.
- Select the *Race Code 6-Other* (this should be whatever your major student race is).
- Click the **Continue** button.



Viewing Errors and Reports

- Click the **Child Count Maintenance** button.
- Each student with a **Red Push Pin** icon has errors. Highlight any of these students in the browse box, and view the data to the right.
- Each student with a **Red X** has been excluded from Child Count.
- Click the *Errors Reports* tab and select button to generate an error report.
- Click the *State Reports* tabs and select **Report** button to generate state Child Count reporting.

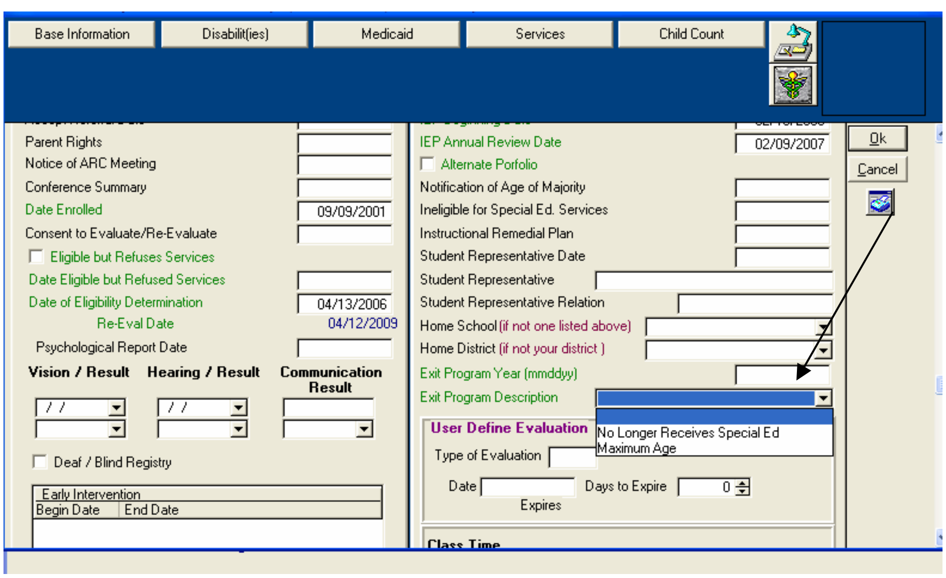


Exiting Report

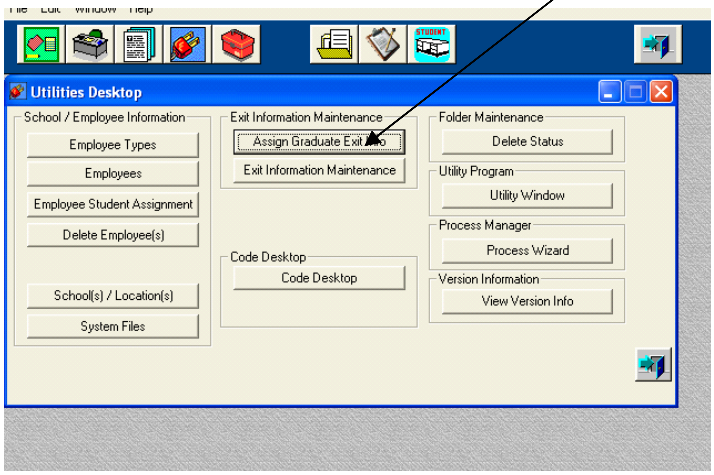
The *Exiting Report* in STIDistrict Sets is generated with data that is entered both STISets and STIOffice. The Exiting Report will report those students in STISets who: no longer receive Special Ed services; reached maximum age; or have had Graduate Exit Information assigned. It will report those Special Ed Students in STIOffice who have been given a withdrawal code.

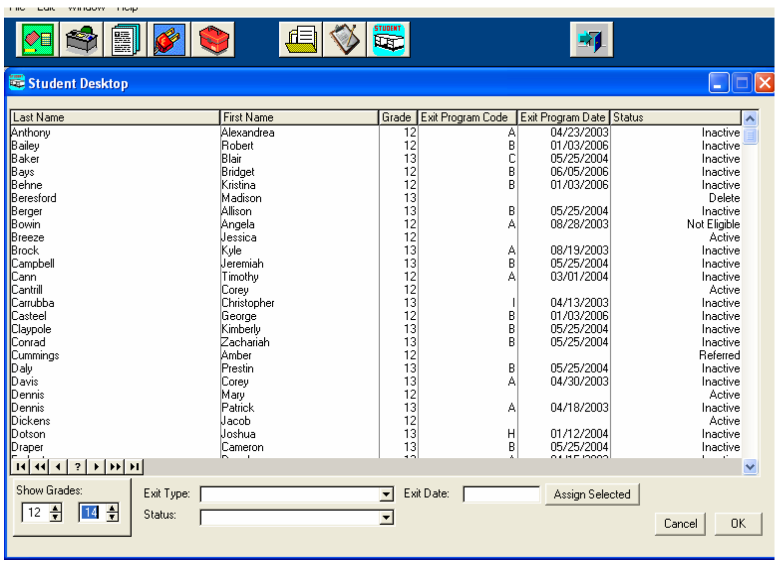
In STISets Student Folder, the students can be exited using the exit types: **No Longer Receives Special Ed** or **Maximum Age**

- Enter the exit date.
- Select the appropriate Exit type.

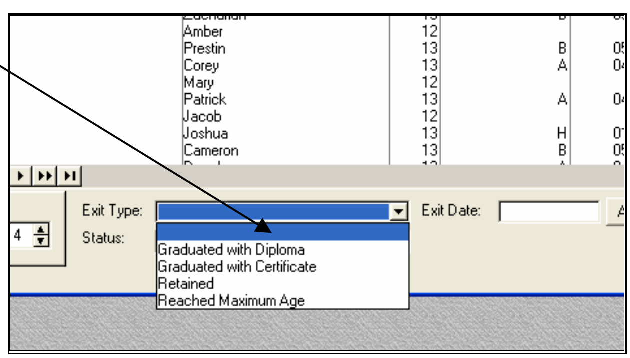


Graduate Exit Information is entered in STISets in the Utility Window, **Assign Graduate Exit Info**.



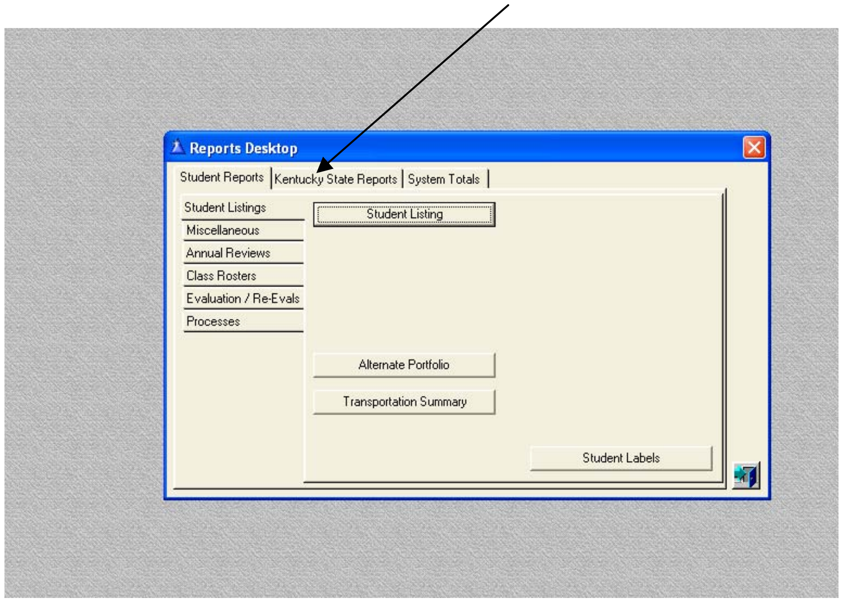


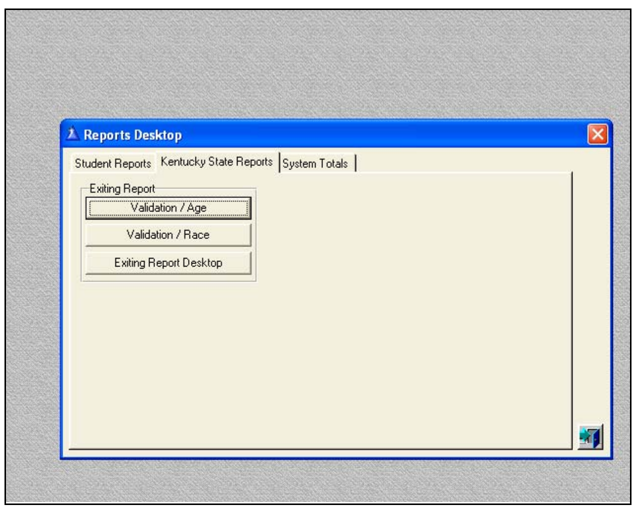
This screen will display all students in the STISets program for grades 12-14. Graduates should be assigned an exiting type, status, and exit date. This can be done for multiple students assigned the same exit type. After this information has selected for the desired students, click **Assign Selected**. Repeat this process for each of the exit types.



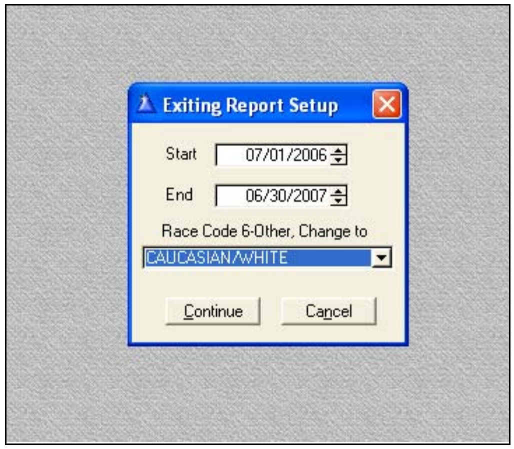
After the Graduate Exit Information has been assigned for all the graduating seniors, there should be an upload to district. The information from STISets and the Withdrawal Information from STIOffice will be used to create STIDistrict Sets Exiting Report.

To create the District Exiting Report, go to Report Desktop, Kentucky State Reports.





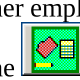
- Select the desired Exiting Report and enter the Start and End Dates.

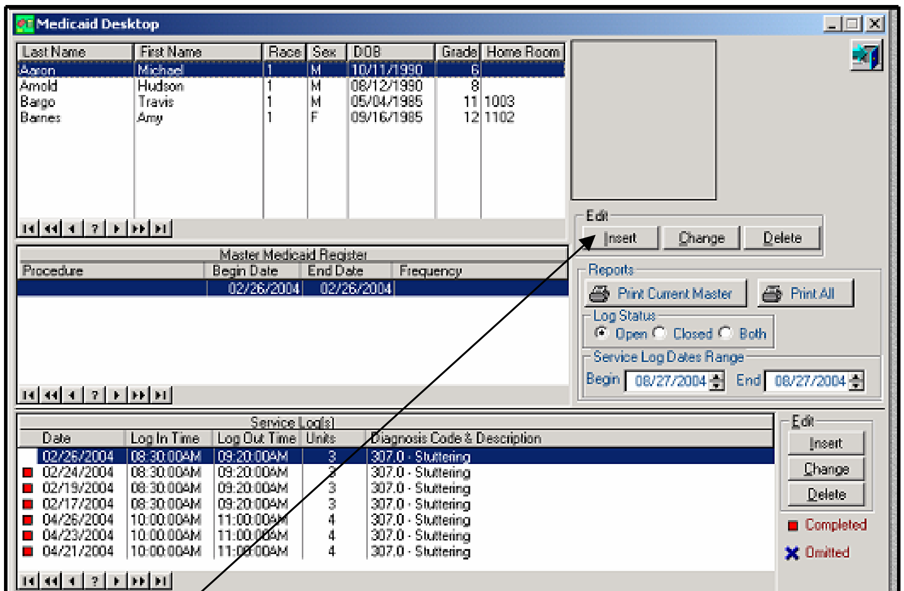


- The Validation/ Age Report will list the students who have exit information by Name, Primary Disability, Age, LEP, and Exit Code.
- The Validation /Race Report will list the students who have exit information by Name, Primary Disability, Race, LEP, and Exit Code.
- The Exiting Report Desktop will report the analytical count of exiting students by disability, age, race, gender, LEP, and exit code.

Medicaid

The **Medicaid Desktop** in STISets allows the user to directly enter and maintain Medicaid service information without having to access individual records in **Student Desktop**. It also allows for printing and submission in STIDistrict Sets. This process begins at the school level in the Medicaid Desktop. In order for an employee to have access to Medicaid in STISets, the employee must: be given access to the Medicaid Desktop; have the *Modifier* and *Sequence Numbers* assigned; and have the *Eligible to bill Medicaid* box marked in his or her employee file.

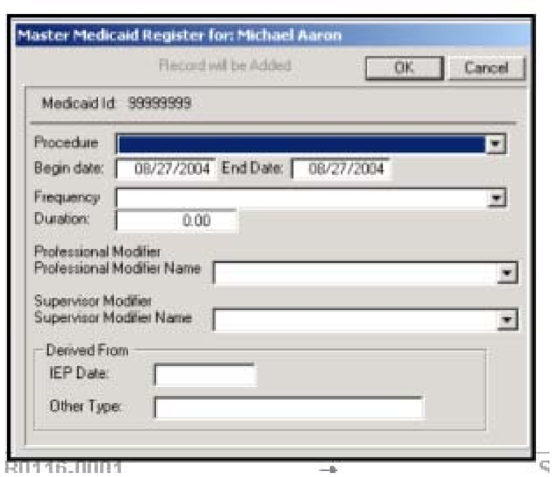
To open Medicaid Desktop in a local school install of STISets, click the  button.



Master Medicaid Register

In this section, the user selects procedures, dates, time, frequency and service provider before the services are provided.

- Click **Insert** to create a record, or select a record and click **Change** to modify it. To remove a record, select it and click **Delete**.

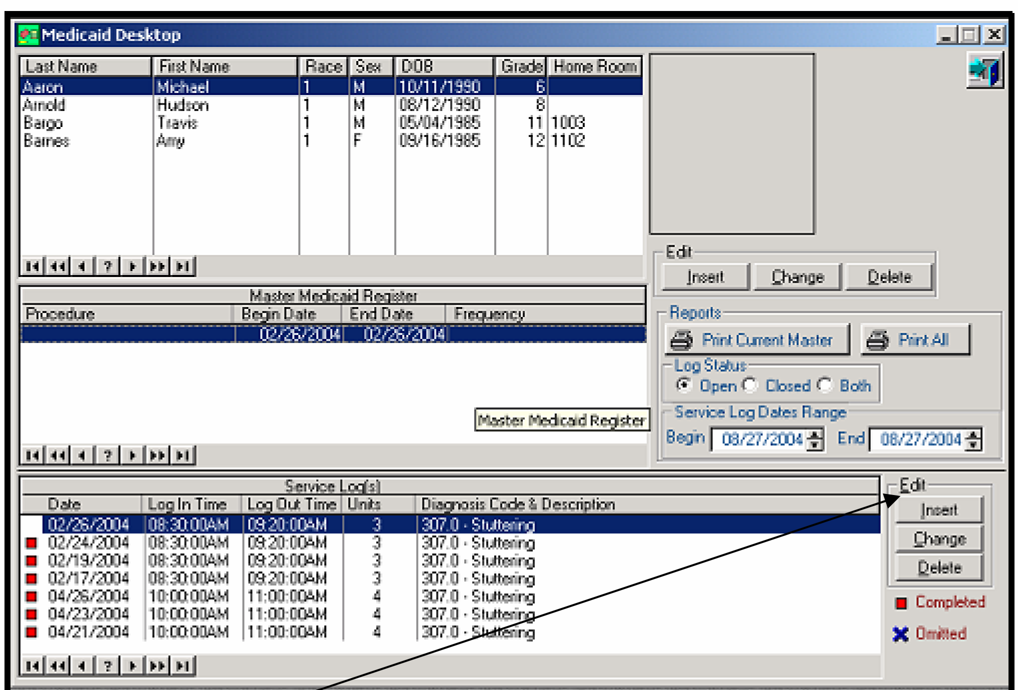


- Select a *Procedure* from the drop-down list.
- Set service dates.
- Use the drop-down list to select a *Frequency* of services.
- Enter the duration of the services in *minutes*, such as *30.00*.
- Use the drop-down list to select a *Professional Modifier Name*.
- Use the drop-down list to select a *Supervisor Modifier Name*.
- In the *Derived From* section, enter the *IEP Date* or *Other Type* (the latter may reflect *ARC/Notice Meetings/Conference Summary/* All other type except *IEP*).
- Click **OK** to save.

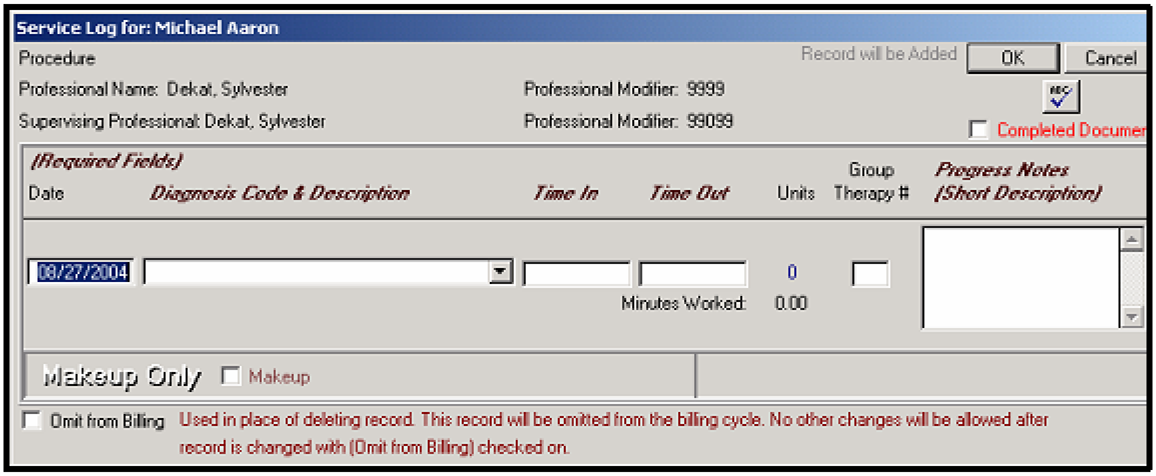
Service Logs

The *Service Log* is used to maintain information such as the date, diagnosis code and description for Medicaid Services. Service notes may be entered here after services have been provided.

To add a record to the service log, make sure the correct student is selected in the *Student Listing* browse box at the top of the menu, and then select the appropriate service record in the *Master Medicaid Register* browse box in the middle of the menu.



- The user may **Insert**, **Change** or **Delete** records in this section.



- The current *Date* will appear by default; if the actual date of service is different, this may be changed. Use the format of *mm/dd/yyyy*.
- Use the drop-down list to select a *Diagnosis Code and Description*.
- Record the *Time In* and *Time Out* using military time format (for example, *1000* and *1430* would indicate 10:00 a.m. to 2:30 p.m.).
- If *Group Therapy* services are provided, enter the number of people in the group.
- Enter any *Progress Notes* in the space provided.
- Check the *Makeup* box if the student has missed a session and the current record reflects a make-up session.
- The *Omit From Billing* option is used in place of *Delete Record*. If this option is selected, no other changes can be made to the record.
- Check the *Completed Document* box at the top of the menu and then click **OK** to save the information.

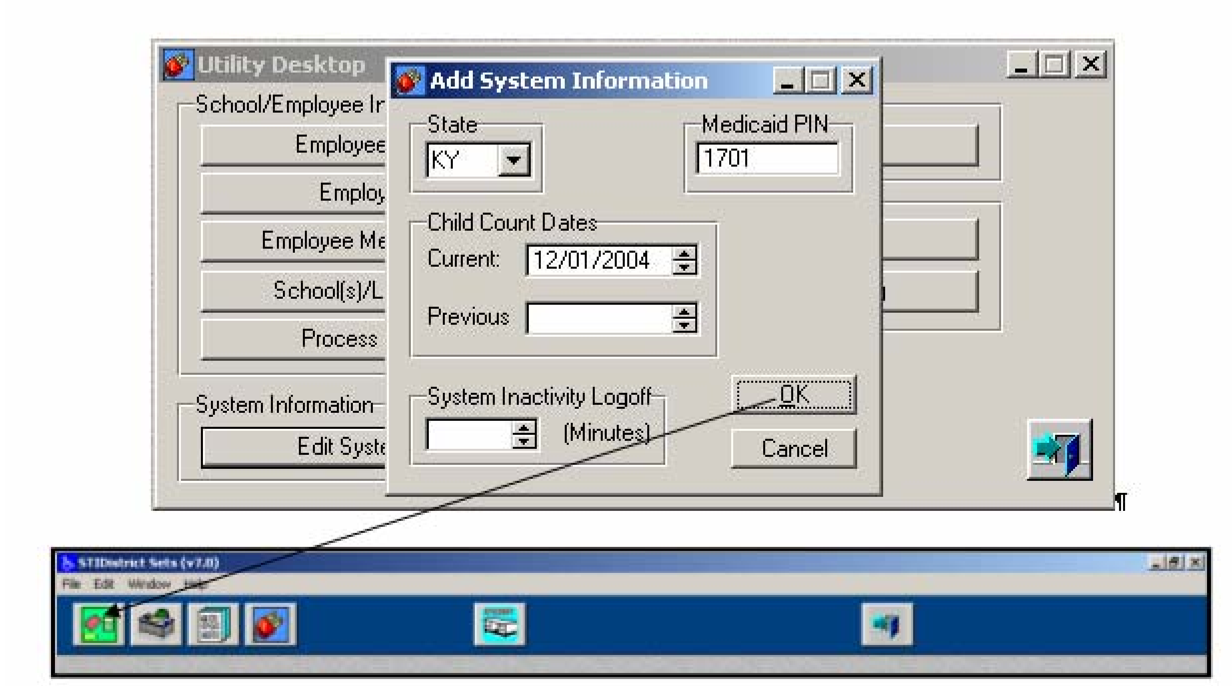
Medicaid Submissions

Medicaid Desktop in STIDistrict Sets allows users to make Medicaid submissions at the district level. Several reports are included that will allow the user to produce error logs for both omitted and denied submissions.

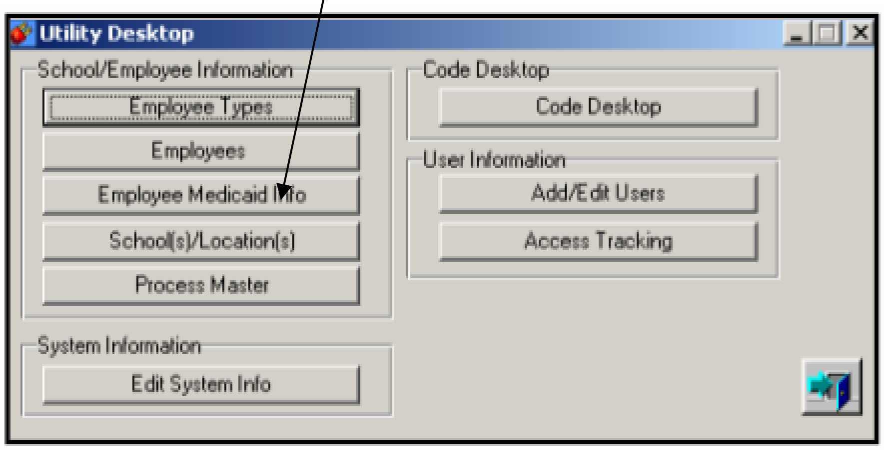
Setup for Medicaid Submissions

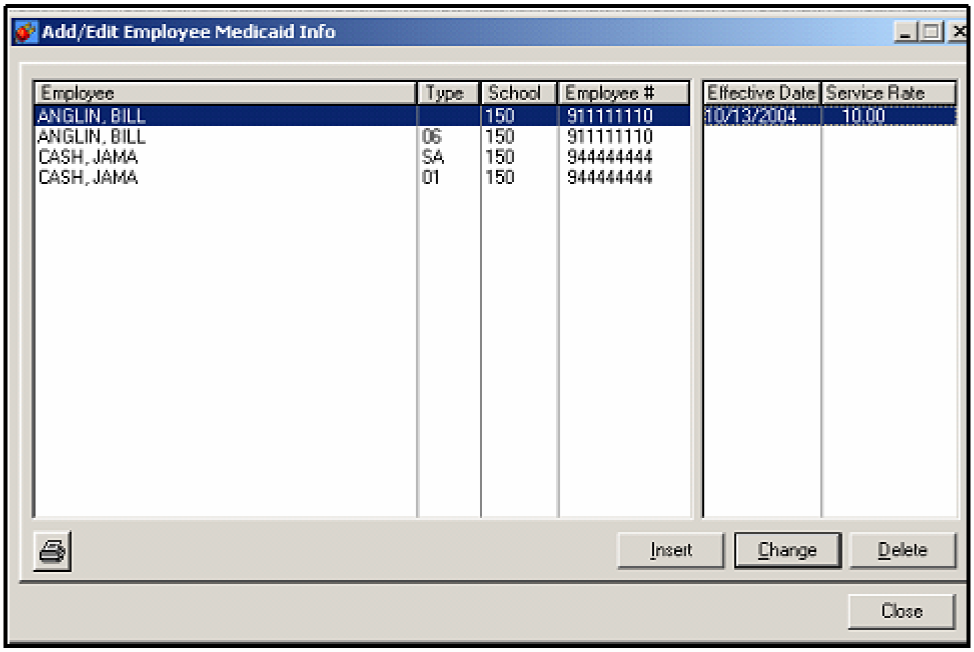
The steps required for users to enable access to Medicaid in STIDistrict Sets are listed below.

- Activate **Medicaid Desktop** by doing the following:
  - In **Utility Desktop** while in *Edit System Information*, press the *CTRL* and *F8* keys together.
  - Type *BILLMEDICAID* into the text field labeled *Medicaid PIN* that appears then click **OK**. This will turn on the Medicaid icon at the upper left of the tool bar.

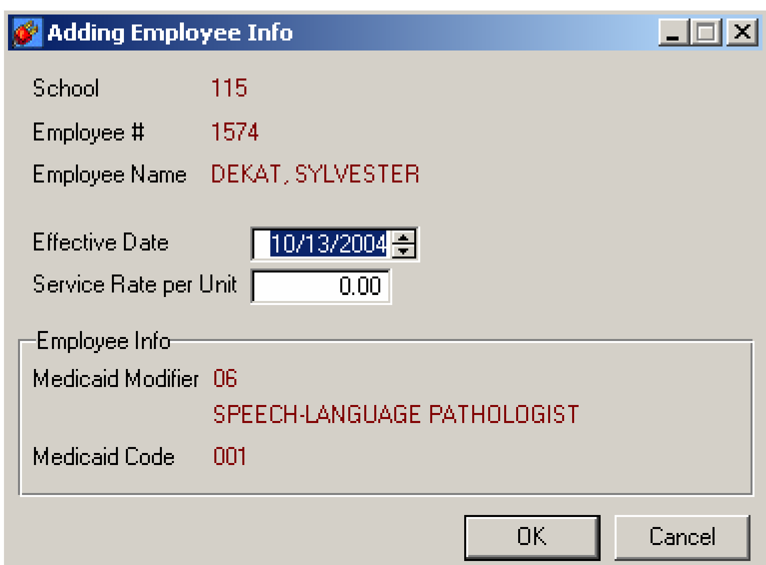


- You will also need to insert the effective billing date and service rate per unit for your billable employees. This is done by going into the **Employee Medicaid Info** area of the Utility Desktop.



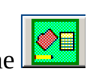


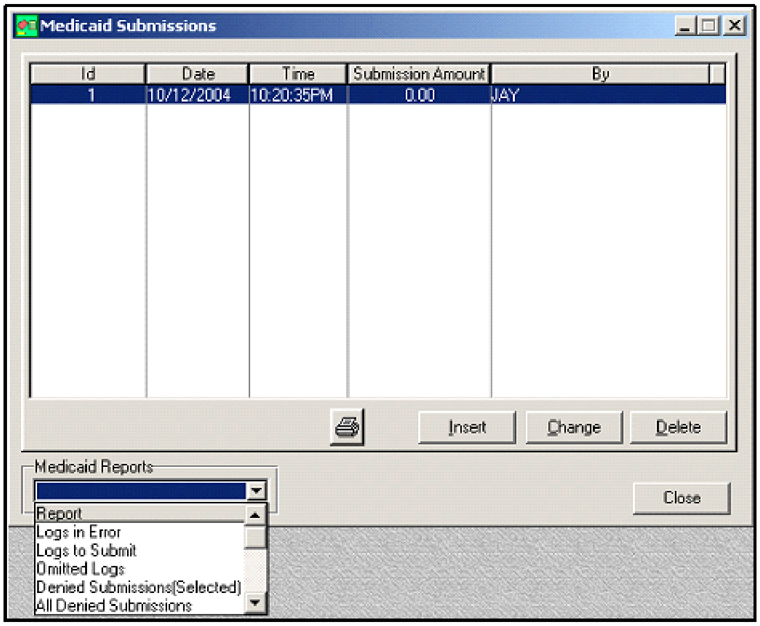
- Highlight the employee and click the **Insert** or **Change** button to open the following screen, where you may enter this information. **Delete** will delete the selected employee from the list.



- Once these steps have been completed, you are ready to create the submissions for billing.

Making Medicaid Submissions

- To open Medicaid in STIDistrict Sets, click the  button.



- Click **Insert** to build a Medicaid submission. **This will create the submissions that may be printed on Health Insurance Claim forms.**
- Click **Change** to unlock previously submitted transmissions. These must be unlocked before you may **Delete** any build.
- **Medicaid Reports** will allow you to print any of the following:
    - Logs in Error
    - Logs to Submit
    - Omitted Logs
    - Denied Submissions
    - All Denied Submissions

Appendix A

KDE Contacts

Data Policy Management and Research
(502) 564-5279
Windy Newton…………………Windy.Newton@education.ky.gov
Michele Kays …………………Michele.Kays@education.ky.gov
Troy McGinnis…………………Troy.McGinnis@education.ky.gov

Attendance
(502) 564-3846
Sherri Clusky…………………Sherri.Clusky@education.ky.gov
Tracy Browning…………………Tracy.Browning@education.ky.gov

Calendar
(502) 564-3846
Sherri Clusky…………………Sherri.Clusky@education.ky.gov
Michael Speer…………………Michael.Speer@education.ky.gov

Extended School Services
(502) 564-4772
Jennifer Carroll…………………Jennifer.Carroll@education.ky.gov
Monica Simpson…………………Monica.Simpson@education.ky.gov

Federal Programs – Title 1
(502) 564-3791
Diane Robertson…………………Diane.Robertson@education.ky.gov

FRYSC
(502) 564-4986
Michael Denney…………………Michael.Denney@ky.gov

Gifted and Talented
(502) 564-2106
Leah Ellis…………………Leah.Ellis@education.ky.gov
Greg Finkbonner…………………Greg.Finkbonner@education.ky.gov

Growth Factor
(502) 564-3846
Karen Wirth…………………Karen.Wirth@education.ky.gov

Health Services
(502) 564-2706
Karen Erwin…………………Karen.Erwin@education.ky.gov

Homeless Children/Youth
(502) 564-3791
Mary Marshall…………………Mary.Marshall@education.ky.gov

KEES
(800) 928-8926
Rebecca Gilpatrick…………………RGILPATRICK@kheaa.com

LEAD
Education Professional Standards Board
(502) 564-4606
Cindy Godsey…………………Cindy.Godsey@ky.gov

Learn and Serve
(502) 564-4201
Joan Howard…………………Joan.Howard@education.ky.gov

Language Proficiency
(502) 564-2106
Shelda Hale…………………Shelda.Hale@education.ky.gov
Maureen Keithley…………………Maureen.Keithley@education.ky.gov
Edgar Adams…………………Edgar.Adams@education.ky.gov

Preschool
(502) 564-7056
Annie Rooney French…………………Annie.French@education.ky.gov

Non-Academic
(502) 564-5279
Chris Thacker…………………Chris.Thacker@education.ky.gov

SAAR
(502) 564-3846
Karen Wirth…………………Karen.Wirth@education.ky.gov

Safe Schools
(502) 564-3678
Libby Taylor…………………Libby.Taylor@education.ky.gov
Nijel Clayton…………………Nijel.Clayton@education.ky.gov

Secondary GED
(502) 564-4772
Jennifer Carroll…………………Jennifer.Carroll@education.ky.gov

Special Education Services
(502) 564-5279
Chris Thacker…………………Chris.Thacker@education.ky.gov

Standardized Course Codes
(502) 564-9850
Robin Chandler…………………Robin.Chandler@education.ky.gov

TEDS
(502) 564-3472
Kimberly Rice…………………Kimberly.Rice@education.ky.gov

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